NHS Dental Services

*provided by...*

NHS

Business Services Authority

# Dental Portal user manual

# Contents


**1 INTRODUCTION** ..... **3**

1.1 Purpose ..... **3**

1.2 Scope ..... **3**

**2 INITIAL STEPS** ..... **3**

**3 LOGIN** ..... **4**

**4 FORGOTTEN CREDENTIALS** ..... **4**

**5 HOME** ..... **7**

**6 MY PROFILE** ..... **8**

**7 CONTRACTS** ..... **9**

7.1 Current Contracts ..... **10**

7.2 Contract Details – Provider view ..... **11**

7.3 Contract Details – Performer View ..... **16**

7.4 Find Contracts ..... **16**

7.5 ..... **17**

7.6 Manage Bank Details ..... **18**

7.7 Contract Activity ..... **20**

7.7.1 Contract Activity By Performer ..... 21

7.7.2 FP17 forms ..... 22

**8 FP17s** ..... **22**

8.1 FP17 Forms Summary by Contract ..... **22**

8.2 Current FP17 Forms ..... **24**

8.3 Find FP17s ..... **25**

**9 NHS PENSIONS - ANNUAL RECONCILIATION REPORTS (ARR)** ..... **27**

9.1 Provider Process ..... **28**

9.2 Performer Process ..... **28**

9.3 Provider Administrator View ..... **28**

9.4 Year End Superannuation Reconciliation ..... **28**

9.5 Guidance for Completing Annual Reconciliation Report ..... **28**

9.6 Post Annual Reconciliation Process ..... **29**

**10 PAY STATEMENTS** ..... **29**

**11 REPORTS** ..... **33**

11.1 Provider Reports ..... **33**

11.2 Performer Reports ..... **35**

**12 EDI PIN** ..... **35**

12.1 Provider EDI PIN ..... **35**

12.2 Performer EDI PIN ..... **37**

**13 USER MANAGEMENT** ..... **38**

13.1 Create an Administrator ..... **38**

13.2 Manage Administrator Users ..... **41**

**14 APPENDIX – CONTRACT ACTIVITY AND FP17 REPORTS FLOWCHART ..... 1**

# 1 INTRODUCTION

This project is intended to enhance the on-line services provided by the Provider and Performer Portal (PPP). The scope of the project will provide additional Portal functionality to support the NHSBSA's drivers to get dentists online and improve customer service. This functionality may be partially or fully replaced when the new payment management, contract management, activity management and pension management solutions are delivered.

## 1.1 Purpose

The purpose of this document is to provide a reference for training and new users of the portal as to the activities that can be performed as a provider, performer, provider-performer or provider administrator using the new functionality.

## 1.2 Scope

The scope of this document is to cover detail the activities that can be performed while using the portal as a provider, performer, provider-performer or provider administrator.

# 2 INITIAL STEPS

Once your activation letter has been received you should be able to activate your portal account using the activation code contained therein. Click on the link (or cut and paste it into your internet browser navigation bar) to open up the Portal activation page.

If you haven't received an activation code you can request one by navigating to the Request Activation Letter page - https://www.nhsbsadental.nhs.uk/portal/flow/activationLetter

When activating your Portal account, you will need to enter the following mandatory details:

- Provider or Performer Number
- Activation ID
- Email address and confirm Email address
- Password and password confirmation
- Memorable word and memorable word confirmation
- Security question
- Security answer and confirm security answer

Take care before attempting to activate your Portal account to ensure that your provider/performer number is to hand since you will not be able to complete the activation process without this information. You should also bear in mind that the email address, password, memorable word and in some cases your security question and answer credentials will be required to login to the Portal. Be sure to use credentials that comply with the on-screen requirements and that can be remembered easily. All of these details entered are also case sensitive.

Your email address will be used for any further Portal communications, e.g. in the event of an EDI PIN request or forgotten credentials situation.

## 3 LOGIN

When you have completed the activation process the login page Figure 1 will be displayed:

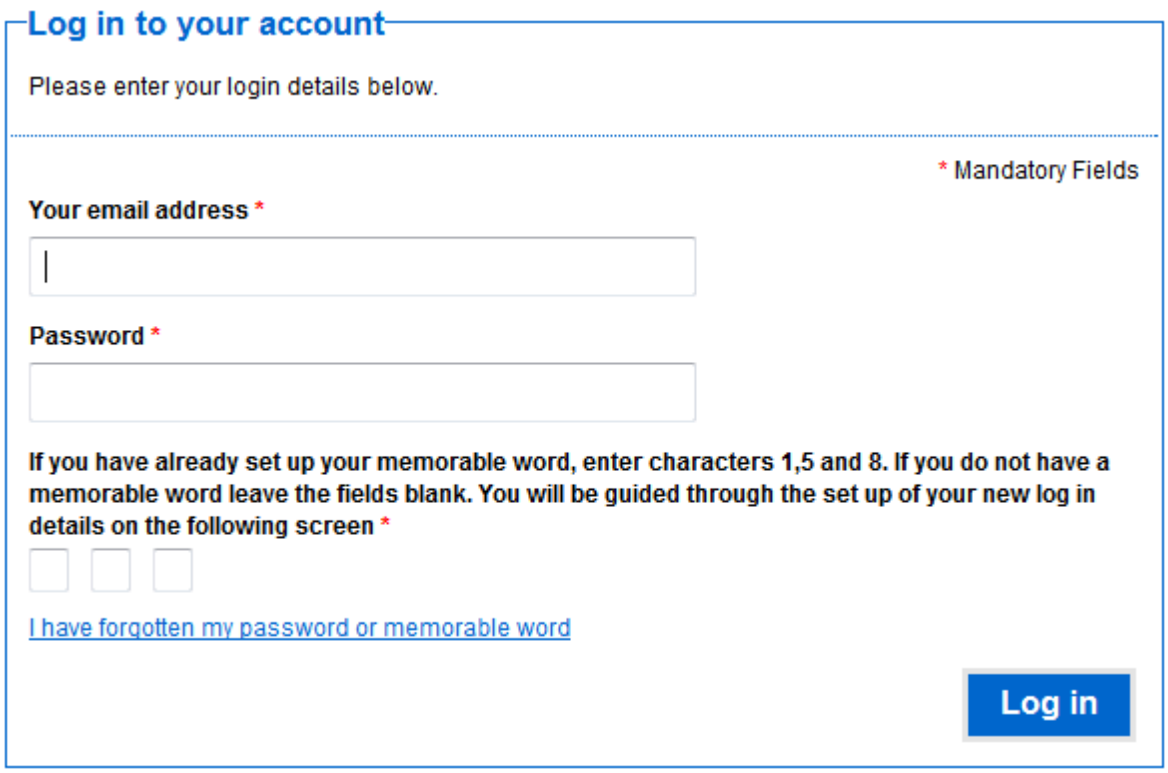

Log in to your account
Please enter your login details below.
* Mandatory Fields
Your email address *
Password *
If you have already set up your memorable word, enter characters 1,5 and 8. If you do not have a memorable word leave the fields blank. You will be guided through the set up of your new log in details on the following screen *
I have forgotten my password or memorable word
Log in

**Figure 1: portal login page**

Enter your email address, password and memorable word characters requested and click the *Log in* button in order to proceed. Alternatively, click on the *I have forgotten my password or memorable word* link in order to reset your forgotten details.

## 4 FORGOTTEN CREDENTIALS

If you have forgotten your password or memorable word, clicking on the *I have forgotten my password or memorable word* link via the Login page will generate an email to your specified account.

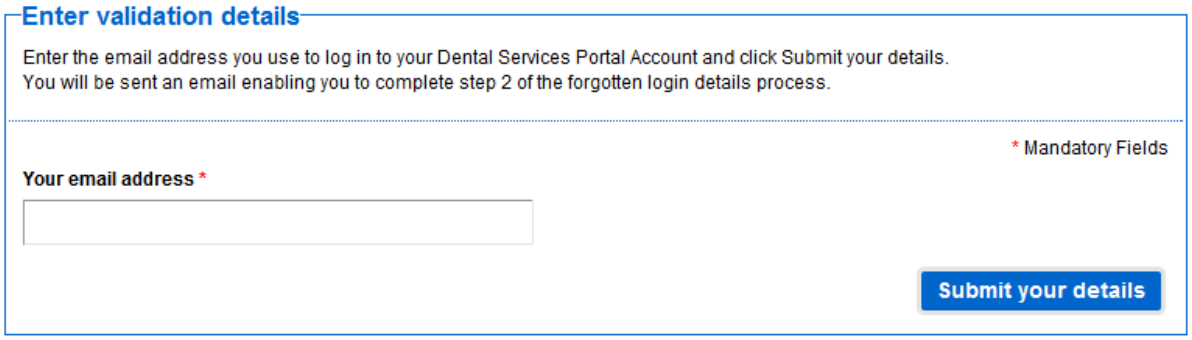

Enter validation details
Enter the email address you use to log in to your Dental Services Portal Account and click Submit your details.
You will be sent an email enabling you to complete step 2 of the forgotten login details process.
* Mandatory Fields
Your email address *
Submit your details

**Figure 2: forgotten password page**

Once received, the email will contain a link to the Reset Login Details page. Click on the link (or paste it into your internet browser navigation bar) to open up the page [Figure 3].

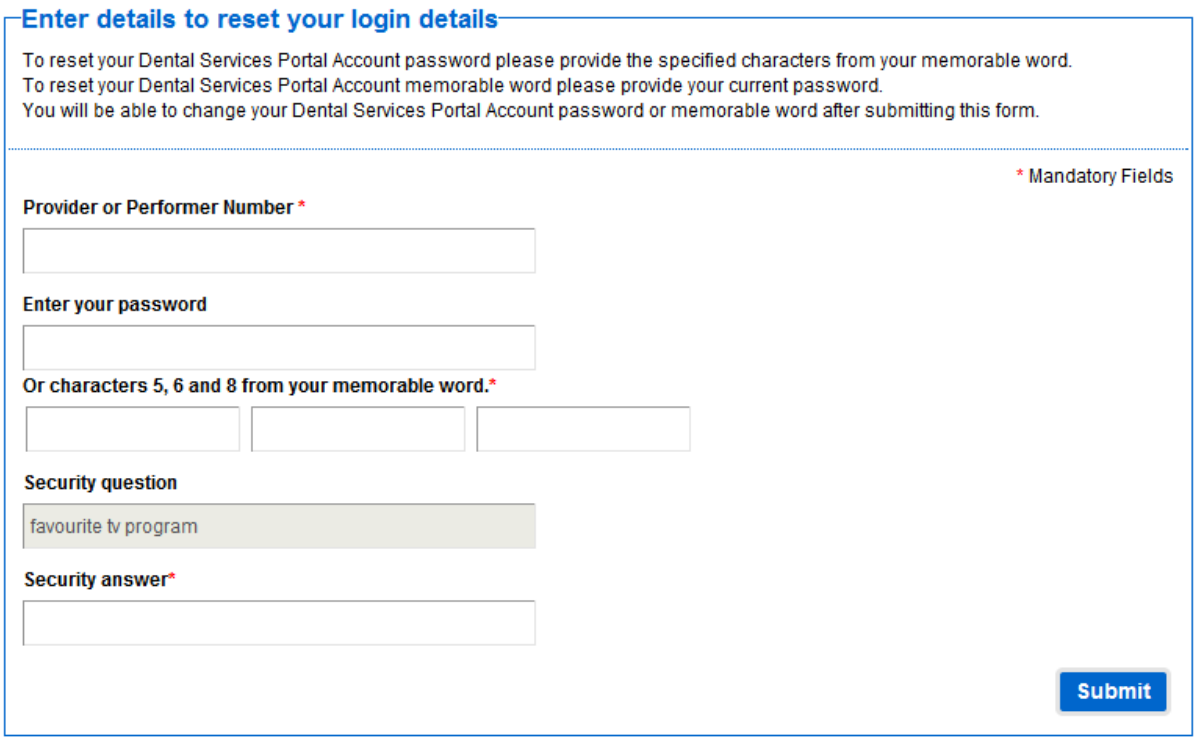

Enter details to reset your login details
To reset your Dental Services Portal Account password please provide the specified characters from your memorable word.
To reset your Dental Services Portal Account memorable word please provide your current password.
You will be able to change your Dental Services Portal Account password or memorable word after submitting this form.
* Mandatory Fields
Provider or Performer Number *
Enter your password
Or characters 5, 6 and 8 from your memorable word.*
Security question
favourite tv program
Security answer*
Submit

**Figure 3: reset login details page**

Fill out the required fields with your provider/performer number, your security answer and –

- your password (if you have forgotten your memorable word) **or**
- your memorable word characters (if you have forgotten your password).

**If you have forgotten your security question or your email address you will need to contact the NHSBSA helpdesk for further assistance: http://www.nhsbsa.nhs.uk/DentalServices/790.aspx.**

If you enter your provider/performer number, password and **security answer** correctly then the next page will enable you to update your **memorable word** credentials. Once you have entered and confirmed your new memorable word you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

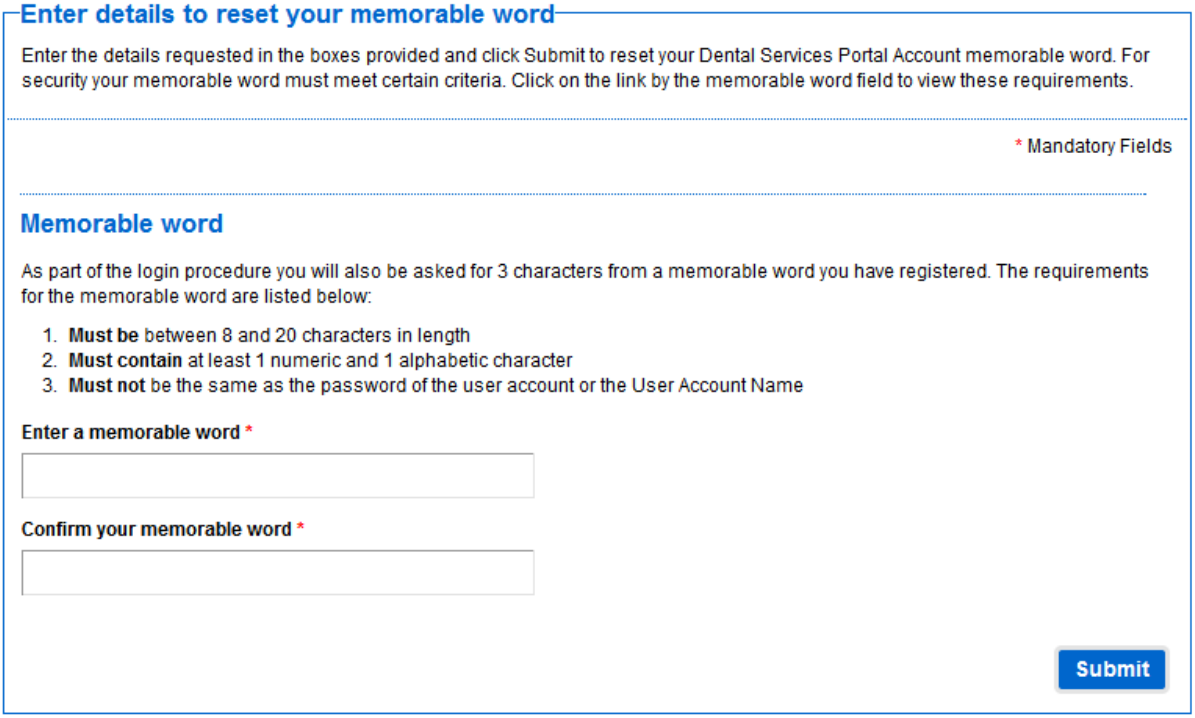

Enter details to reset your memorable word
Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account memorable word. For security your memorable word must meet certain criteria. Click on the link by the memorable word field to view these requirements.
* Mandatory Fields
Memorable word
As part of the login procedure you will also be asked for 3 characters from a memorable word you have registered. The requirements for the memorable word are listed below:
1. Must be between 8 and 20 characters in length
2. Must contain at least 1 numeric and 1 alphabetic character
3. Must not be the same as the password of the user account or the User Account Name
Enter a memorable word *
Confirm your memorable word *
Submit

**Figure 4: change memorable word page**

If you enter your provider/performer number, password and **memorable word** correctly then the next page will enable you to update your **password** credentials.

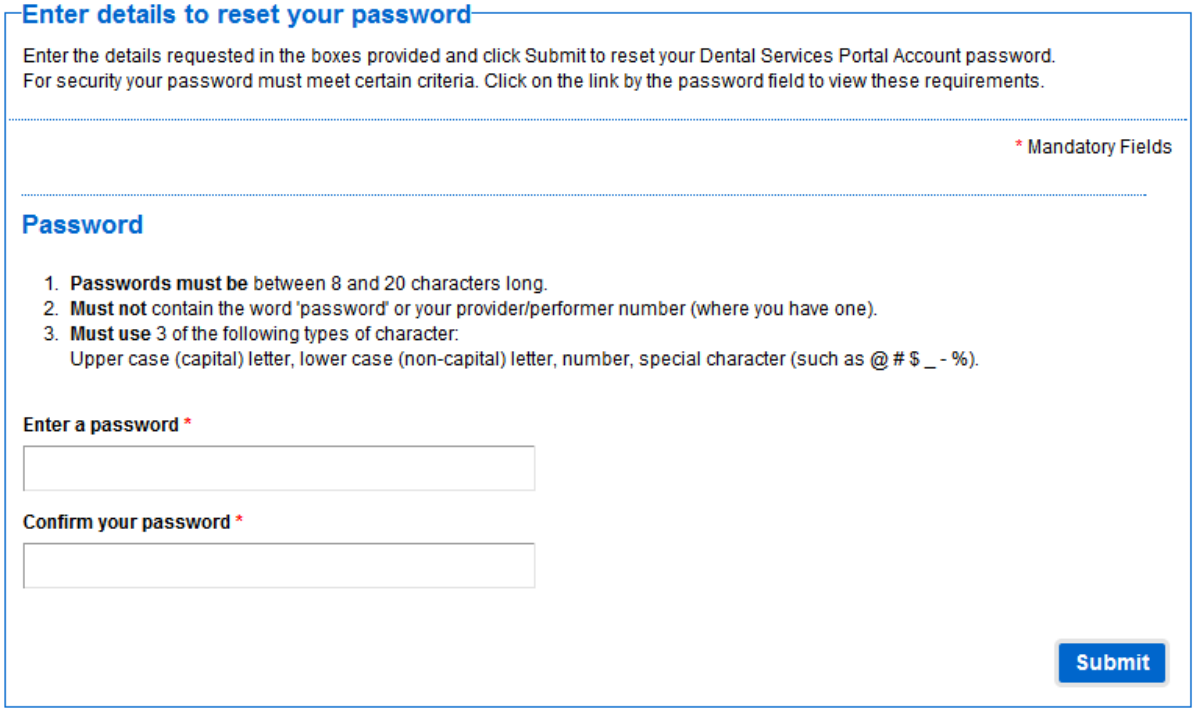

Enter details to reset your password
Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account password.
For security your password must meet certain criteria. Click on the link by the password field to view these requirements.
* Mandatory Fields
Password
1. Passwords must be between 8 and 20 characters long.
2. Must not contain the word 'password' or your provider/performer number (where you have one).
3. Must use 3 of the following types of character:
Upper case (capital) letter, lower case (non-capital) letter, number, special character (such as @ # $ _ - %).
Enter a password *
Confirm your password *
Submit

**Figure 5: reset password page**

Once you have entered and confirmed your new password you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

After logging in, you may logout of the Portal at any time by clicking on the Log Out link in the top left-hand corner of the page [Figure 6]. Please remember to close your internet browser after you do so.

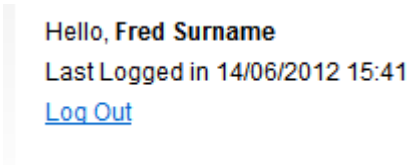



**Figure 6: logout button**

## 5 HOME

Having successfully logged into the Portal you will be directed to the home page [Figure **7**], tailored to the specific requirements of your role.

- Navigation Links – click to navigate to the desired portal functionality.
- System Messages – announcements and information from the NHSBSA. Users may see some variation in the messages displayed depending on various criteria including role, geography, commissioning body and other factors.
- Quick-start links - click to navigate to the desired portal functionality. Users may see some variation in quick-start links displayed depending upon role.

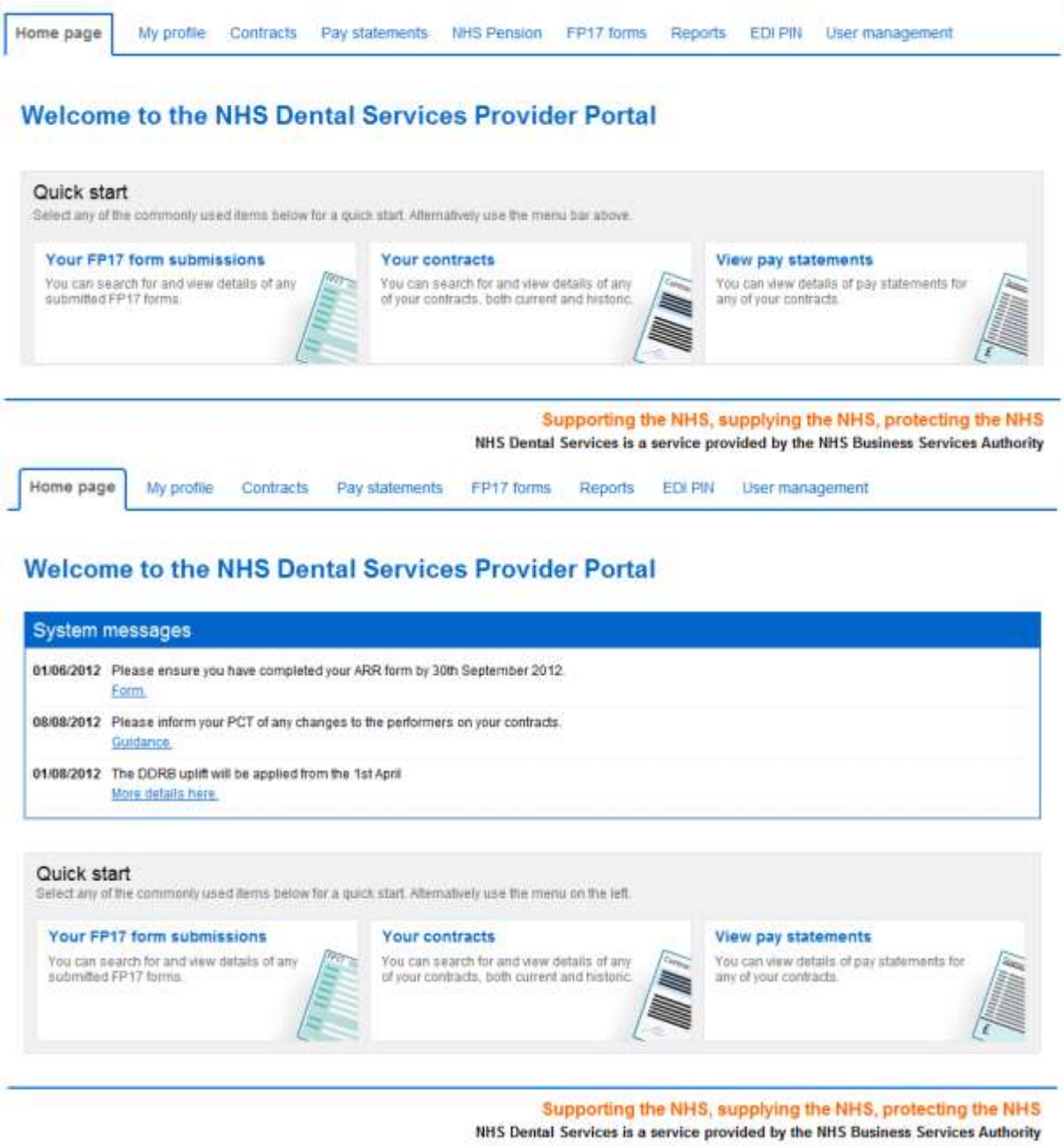

Home page
My profile
Contracts
Pay statements
NHS Pension
FP17 forms
Reports
EDI PIN
User management
Welcome to the NHS Dental Services Provider Portal
Quick start
Select any of the commonly used items below for a quick start. Alternatively use the menu bar above.
Your FP17 form submissions
You can search for and view details of any submitted FP17 forms.
Your contracts
You can search for and view details of any of your contracts, both current and historic.
View pay statements
You can view details of pay statements for any of your contracts.
Supporting the NHS, supplying the NHS, protecting the NHS
NHS Dental Services is a service provided by the NHS Business Services Authority
Home page
My profile
Contracts
Pay statements
FP17 forms
Reports
EDI PIN
User management
Welcome to the NHS Dental Services Provider Portal
System messages
01/06/2012 Please ensure you have completed your ARR form by 30th September 2012.
Form
08/08/2012 Please inform your PCT of any changes to the performers on your contracts.
Guidance
01/08/2012 The DDRB uplift will be applied from the 1st April
More details here
Quick start
Select any of the commonly used items below for a quick start. Alternatively use the menu on the left.
Your FP17 form submissions
You can search for and view details of any submitted FP17 forms.
Your contracts
You can search for and view details of any of your contracts, both current and historic.
View pay statements
You can view details of pay statements for any of your contracts.
Supporting the NHS, supplying the NHS, protecting the NHS
NHS Dental Services is a service provided by the NHS Business Services Authority

**Figure** 7**: provider home page**

## **6** MY PROFILE

The My Profile page [Figure 8] enables you to update your personal contact details and login/security credentials, with options to:

- Change your email address
- Change your correspondence address
- Change your contact telephone number
- Change your password
- Change your memorable word
- Change your security question and answer

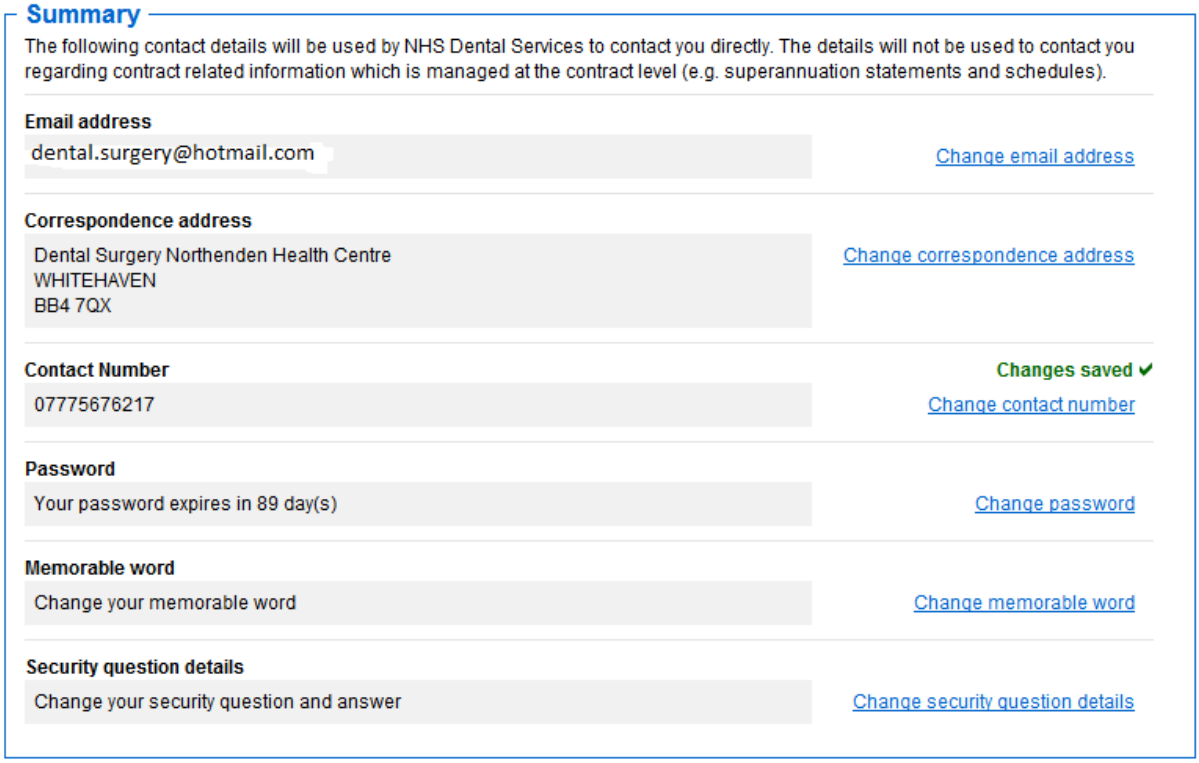

Summary
The following contact details will be used by NHS Dental Services to contact you directly. The details will not be used to contact you regarding contract related information which is managed at the contract level (e.g. superannuation statements and schedules).
Email address
dental.surgery@hotmail.com
Change email address
Correspondence address
Dental Surgery Northenden Health Centre
WHITEHAVEN
BB4 7QX
Change correspondence address
Contact Number
Changes saved
07775676217
Change contact number
Password
Your password expires in 89 day(s)
Change password
Memorable word
Change your memorable word
Change memorable word
Security question details
Change your security question and answer
Change security question details

**Figure 8: my profile page**

All actions on this page follow more or less the same basic steps, namely being:

1. Click on the item to be changed
2. Enter the new item values (e.g. new telephone number)
3. Click *Save changes*
4. Confirm your current password
5. Click on *Proceed* to save the changes
6. Optionally you may quit the change at any time by clicking on the *Cancel* button

Some things you should be aware of:

- If you change your email address, you will **never** be able to revert to the previous email. Please think very carefully before you go ahead with this action since it is irrevocable.
- Your correspondence address can be searched for by postcode and selected from a list of results or entered manually. Whichever method you choose, the Title field is mandatory.
- Your security credentials (password, memorable word, security question details) must follow the on-screen requirements and should not be shared with anyone.
- Email confirmations are sent to your registered email address for all My Profile changes. An email confirmation will also be sent to your *previous* email address in the event of an email address change.

## 7 CONTRACTS

Clicking on the Contracts button will immediately open the current contracts page. Options to search for contracts via the find contracts page or update contract bank details via the manage bank details page are also made available.

## 7.1 Current Contracts

Current contract listing

This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information.

Showing 1-1 of 1 items

| Contract number | Provider | Contract value | UDA | | | UOA | | |
|---|---|---|---|---|---|---|---|---|
| | | | Contracted | Scheduled | Processing | Contracted | Scheduled | Processing |
| (7A6) 332151 0001 | MISS LA EDGAR | £134,873.60 | 5,898.00 | 48.75 | (15.00) | 0.00 | 0.00 | 0.00 |

Showing 1-1 of 1 items

**Figure 9: current contracts (provider view)**

Depending on whether you are a provider [Figure 9: current contracts (provider view)Figure 9] or a performer [Figure 11] you may see a slightly different view:

- **Both** Contract number
    - The unique contract reference, made up of the provider number and the contract iteration [tag].
- **Both** Provider
    - The name of the contract provider.
- **Performer** Start
    - The start date of the contract
- **Performer** End
    - The end date of the contract
- **Provider** Contract value
    - The total contract value for the current financial year.
- **Provider** UDA contracted
    - The Units of Dental Activity contracted for the current financial year.
- **Both** UDA scheduled
    - The units of Dental Activity with a status of processed and included on a Pay Statement, received to-date for the current financial year.
- **Both** UDA processing
    - The Units of Dental Activity with a status of processing and not included on a Pay Statement, received to-date for the current financial year.
- **Provider** UOA contracted
    - The Units of Orthodontic Activity contracted for the current financial year.
- **Both** UOA scheduled
    - The Units of Orthodontic Activity with a status of processed and included on a Pay Statement, received to-date for the current financial year.
- **Both** UOA processing
    - The Units of Orthodontic Activity with a status of processing and not included on a Pay Statement, received to-date for the current financial year.
- **Performer** contracted allocation
    - The performer allocation for the contract
- **Performer** superannuation amount.

- The performer superannuation amount for the contract.

If you are a provider-performer (logged in as a provider - by default), you may change to the performer view by clicking on the *Switch to performer* link [Figure 10]. When viewing pages as a performer, you can switch back by clicking on the *Switch to provider* link.

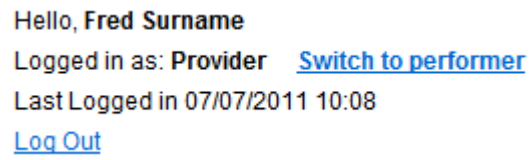
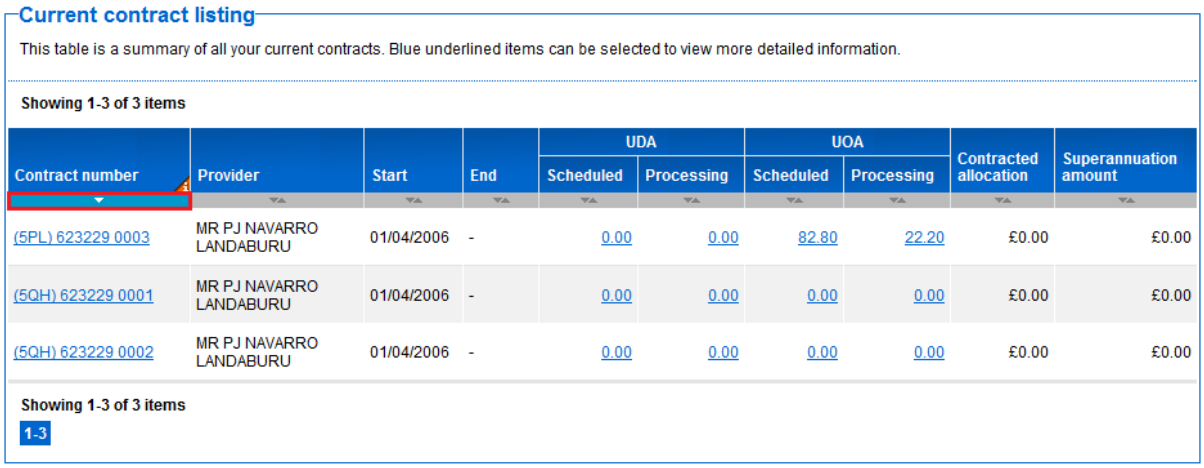



**Figure 10: change to performer or provider view here**

Each column can be sorted into alphabetic or numeric order (depending on the column data) by clicking on the filter button below the column header (highlighted in red - Figure 11).



**Current contract listing**

This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information.

Showing 1-3 of 3 items

| Contract number | Provider | Start | End | UDA | | UOA | | Contracted allocation | Superannuation amount |
|---|---|---|---|---|---|---|---|---|---|
| | | | | Scheduled | Processing | Scheduled | Processing | | |
| (5PL) 623229 0003 | MR PJ NAVARRO LANDABURU | 01/04/2006 | - | 0.00 | 0.00 | 82.80 | 22.20 | £0.00 | £0.00 |
| (5QH) 623229 0001 | MR PJ NAVARRO LANDABURU | 01/04/2006 | - | 0.00 | 0.00 | 0.00 | 0.00 | £0.00 | £0.00 |
| (5QH) 623229 0002 | MR PJ NAVARRO LANDABURU | 01/04/2006 | - | 0.00 | 0.00 | 0.00 | 0.00 | £0.00 | £0.00 |

Showing 1-3 of 3 items

1-3

**Figure 11: current contracts (performer view)**

Clicking on the Contract number link will open up the contract details page.

## 7.2 Contract Details – Provider view

As with the current contracts view, the information available in the contract details page(s) will vary depending on whether you are a provider or a performer, or a provider-performer in provider/performer view – see above.

Clicking on the contract number as a **provider** opens the provider details page initially with several further pages enabling you to drill down further into contract information:

- Contract other addresses
- Contractual summary
- Performers on this contract

We'll go through each page in turn. All information on these pages is read only.

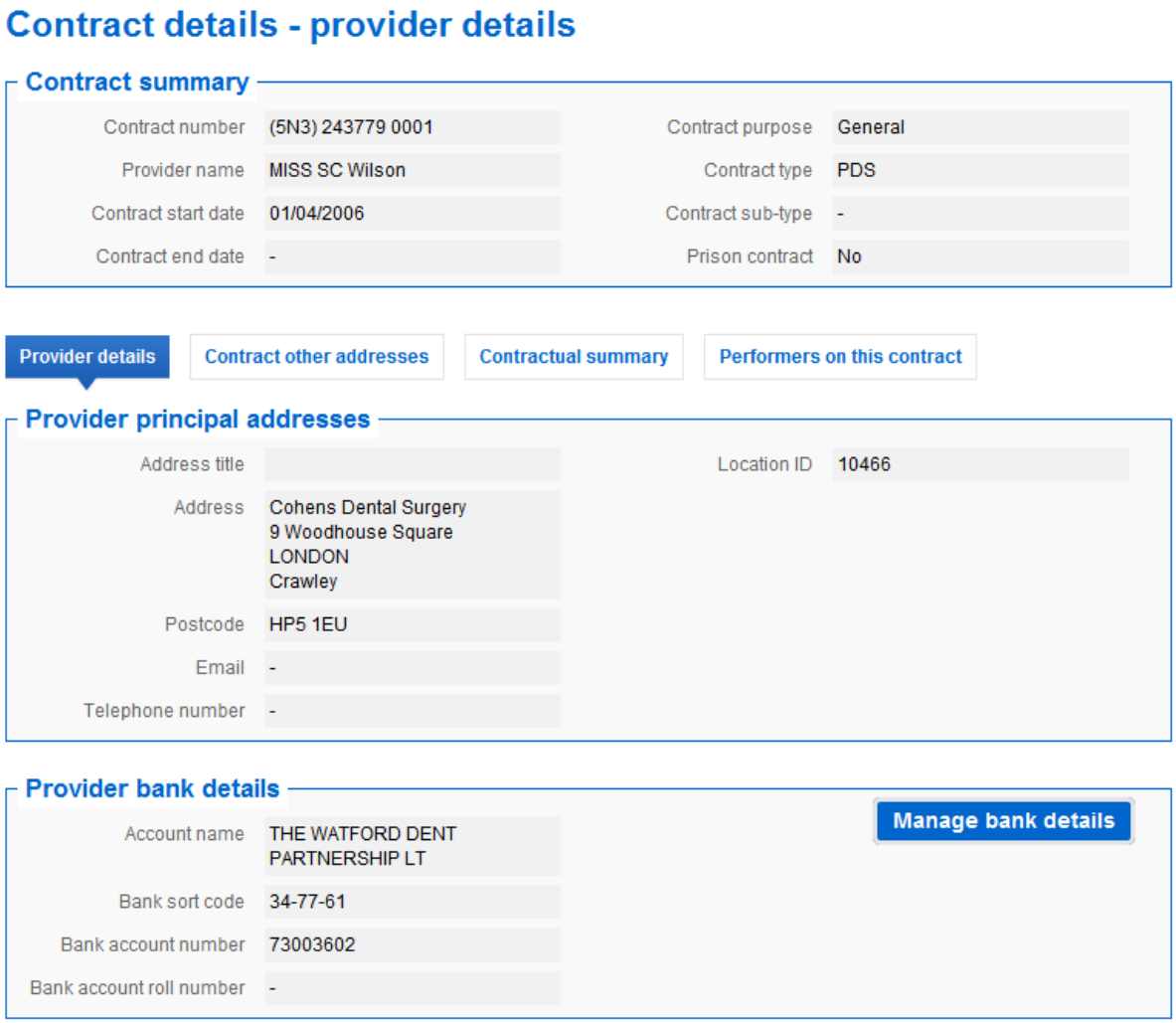



**Figure 12: provider contract details**

- Contract summary
    - Contract number
        1. The unique contract reference, made up of the provider number and the contract iteration [tag].
    - Provider name
        1. The name of the contract provider.
    - Contract start date
        1. The date on which the contract started.
    - Contract end date
        1. The date on which the contract ended. If it is a current contract the end date field may not be populated.
    - Contract purpose
        1. The intended remit of the contract. General, orthodontic or both.
    - Contract type and [Contract sub-type]
        1. The type of contract. GDS, GDS [Pilot], PDS, PDS [Plus], PDS [Pilot], Trust, Trust [Plus].
    - Prison contract
        1. Indicates whether the contract is for a prison(s) with a Yes or No.

The provider's address and bank details are also displayed on the initial contract details page. The contents should be self-explanatory. Note that the Provider bank details section contains a Manage bank details button however. Clicking on this button will open the Manage bank details page, which we'll cover in section 7.6 below.

Clicking on the Contract other addresses button opens up the Provider other addresses view. Obviously where there are no additional addresses the table will be empty. The columns can be re-ordered where necessary by clicking on the filter button.

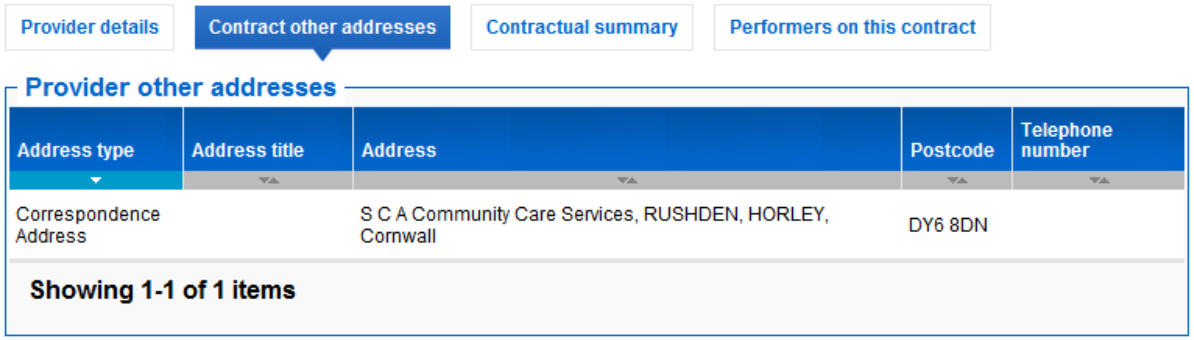



**Figure 13: provider other addresses**

Clicking on the Contractual summary button opens up the Contractual details view containing figures for each year (or period) during the contracts previous history:

- Date from
  - Date contractual details start from.
- Date to
  - Date contractual details end on. (The date may not be present if an end date hasn't been specified).
- Contracted value
  - Contracted value for the 'from' and 'to' dates on the applicable row.
- Contracted UDA
  - Contracted UDA for the 'from' and 'to' dates on the applicable row.
- Contracted UOA
  - Contracted UOA for the 'from' and 'to' dates on the applicable row.
- Contracted Dom visits
  - Contracted number of courses of treatments for domiciliary visits for the 'from' and 'to' dates on the applicable row.
- Contracted sedations
  - Contracted number of courses of treatments for patient sedations for the 'from' and 'to' dates on the applicable row.

Again columns can be re-ordered as required.

**Figure 14: provider contractual details**

Clicking on the Performers on this contract button opens up the List of performers associated with the contract.

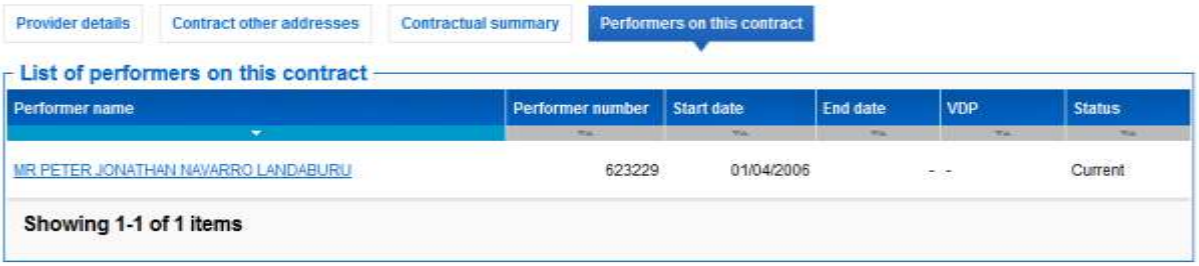



**Figure 15: performers on the contract**

You can drill down into further performer information by clicking on the Performer name link.

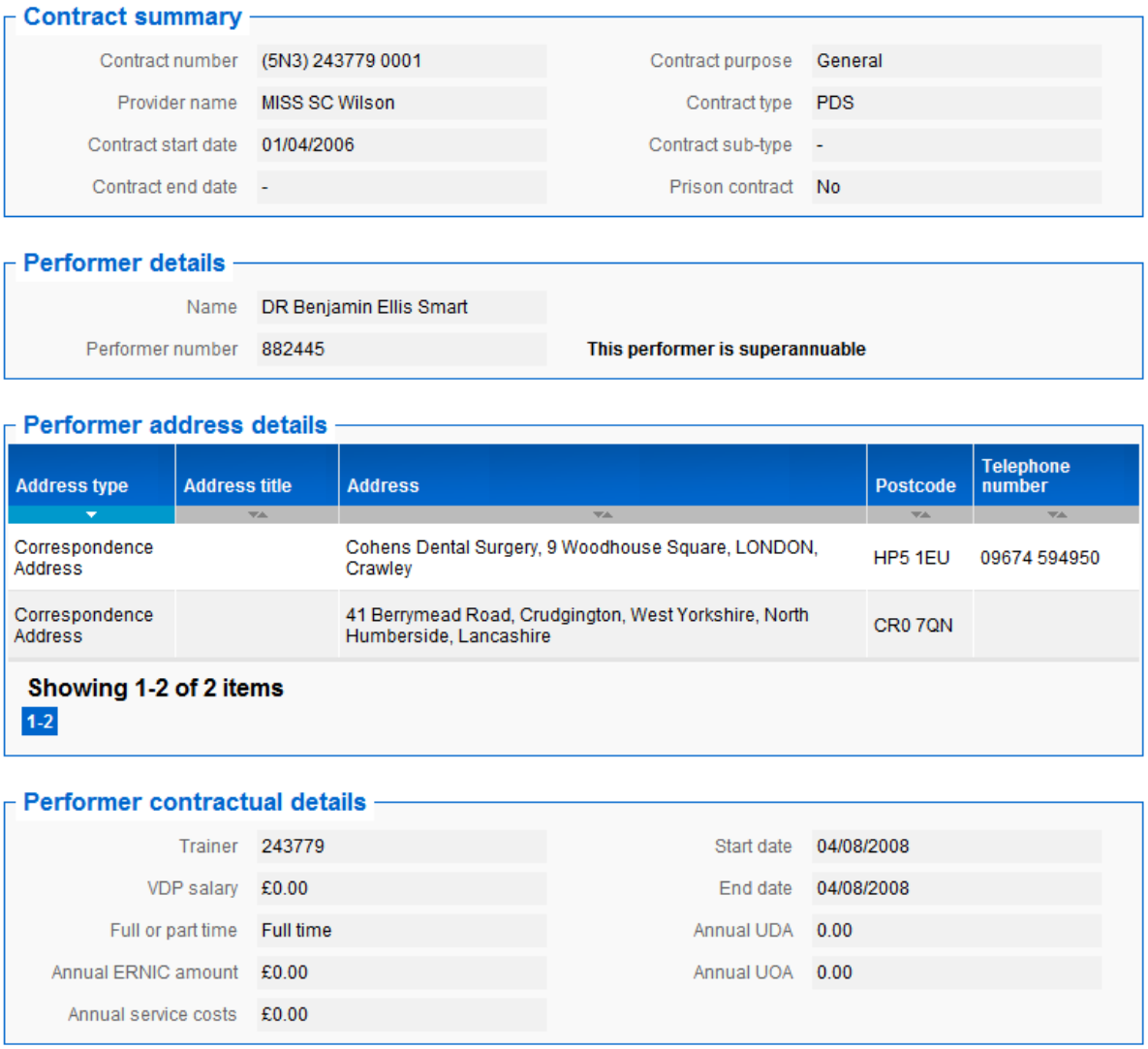



**Figure 16: performer details**

This page [Figure 16] details various items relating to the performer:

- Performer Details
    - Name
    - Performer number
    - Message
        1. *This performer is superannuable*.
        2. *This performer is eligible for seniority*.
- Performer address details
    - Details of addresses associated with the performer on the contract. Personal address for the performer can be found within 'my profile'.
- Performer contractual details
    - May contain more or less items depending on relevance to specific performer.
    - Message
        1. *There will be no contributions to the NHS Pension scheme and no life insurance can be paid if Annual Net Pensionable Earnings does not have an amount.*

- Displayed if the performer **is** superannuable but the net pensionable amount is zero.

- *To comply with the NHS Pension scheme requirements the Annual Contracted Allocation must be completed to ensure the correct calculation of the Net Pensionable Earnings for the contract.*
    1. Displayed if the performer **is** superannuable but the allocated annual amount is zero.
- Trainer
- VDP salary
- Annual gross allocation
- Allocated annual amount – displayed in the event the allocated amount for the performer is > 0 and the performer **is** superannuable.
- Annual allocation
    1. Displayed if the performer **is not** superannuable.
- Annual net pensionable earnings
    1. Displayed if the performer **is** superannuable.
- Annual ERNIC amount
- Annual Grant amount
- Annual service costs
- Start date
- VDP contractual earnings start date for contract.
- End date
- VDP contractual earnings end date for contract.

Clicking on the *internet browser* back button at this point will take you back to the list of performers for further scrutiny. Alternatively you can use the navigation links to open up another view, e.g. the find contracts page [section 7.4**Error! Reference source not found.**].

### 7.3 Contract Details – Performer View

Clicking on the contract number as a **performer** directs you straight to the performer details view described in section 7.2 above.

### 7.4 Find Contracts

Opening the find contracts view presents you with a number of options with which to locate both current and historic contracts using various criteria. Only those contracts that have been opened since 1 April 2006 are available to view within the Portal. We'll run through the options below:

7.5

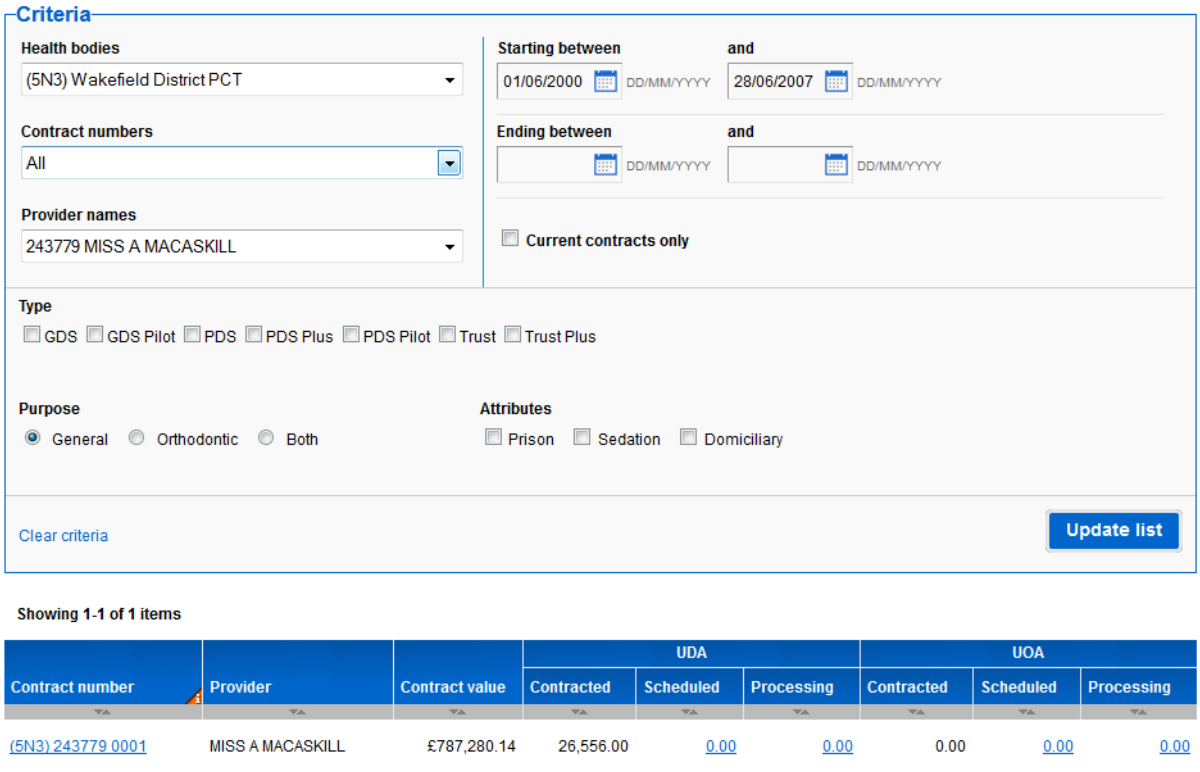



Figure **17**: find contracts

- Health Bodies
    - Restrict search to a single health body by selecting one from the drop down list and then clicking the *Update list* button.
- Contract Numbers
    - Restrict search to a single contract number.
- Provider names
    - Restrict search to a single provider.
- Starting between
    - Refine the contract *start* dates between which you would like to search – e.g. selecting dates *starting between* 01/06/2006 *and* 28/06/2010 will return contracts that *started* on or between the two selected dates.
- Ending between
    - Refine the contract *end* dates between which you would like to search – e.g. selecting dates *ending between* 01/09/2008 *and* 28/02/2011 will return contracts that *ended* on or between the two selected dates.
- Current contracts only
    - Restrict the search to current contracts only.
- Type
    - Restrict the search to specified contract types.
- Purpose
    - Restrict the search to contracts with the specified purpose. Warning! Clicking *Both* here will only return contracts that are both general **and** orthodontic, not contracts that are general **or** orthodontic.

- Attributes
    - Restrict the search to contracts of the specified attributes.

The search filters can also be combined to restrict the search further, e.g. as in the screenshot [Figure 17] selecting the Health body, Provider names, Purpose and Starting between criteria sufficiently restricts the search parameters to only return a single contract result.

Clicking the Clear criteria button will reset all search filters.

Please note also that the columns displayed in the results table will depend on whether you are viewing the page as a provider or a performer. Section 7.1 refers.

## 7.6 Manage Bank Details

Before making any changes to your bank details, you *must* answer the important information questions in [Figure 18Figure 1] below.

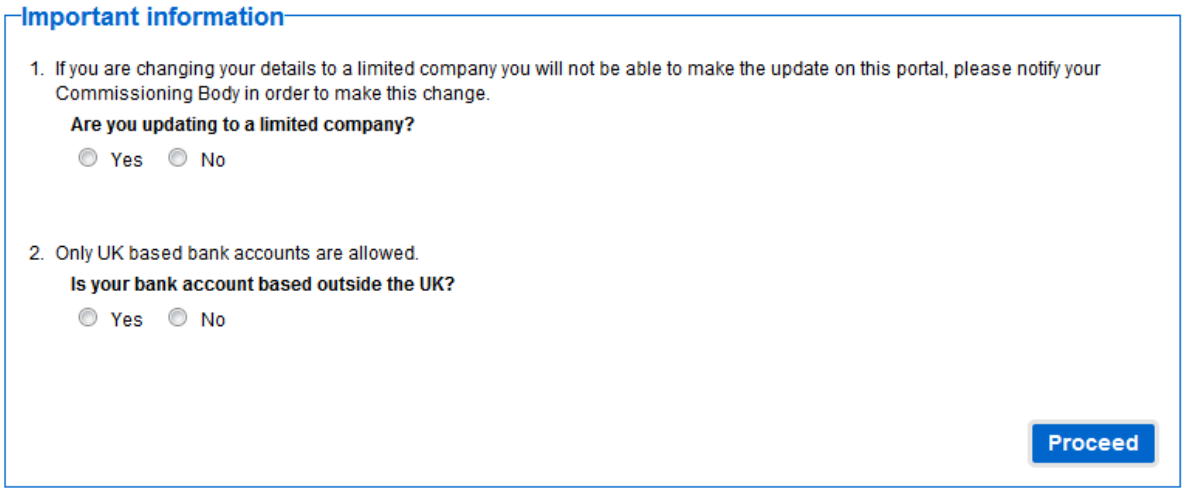

Important information
1. If you are changing your details to a limited company you will not be able to make the update on this portal, please notify your Commissioning Body in order to make this change.
Are you updating to a limited company?
Yes
No
2. Only UK based bank accounts are allowed.
Is your bank account based outside the UK?
Yes
No
Proceed

**Figure 18: manage bank details important questions**

Once you have confirmed that you are *not* changing your bank details to a limited company account, and that your bank account resides within the UK, only then will you be able to proceed and make changes to your bank details.

**If you are changing to a limited company account or, if your account *is* based outside of the UK – please contact your commissioning body regarding the change.**

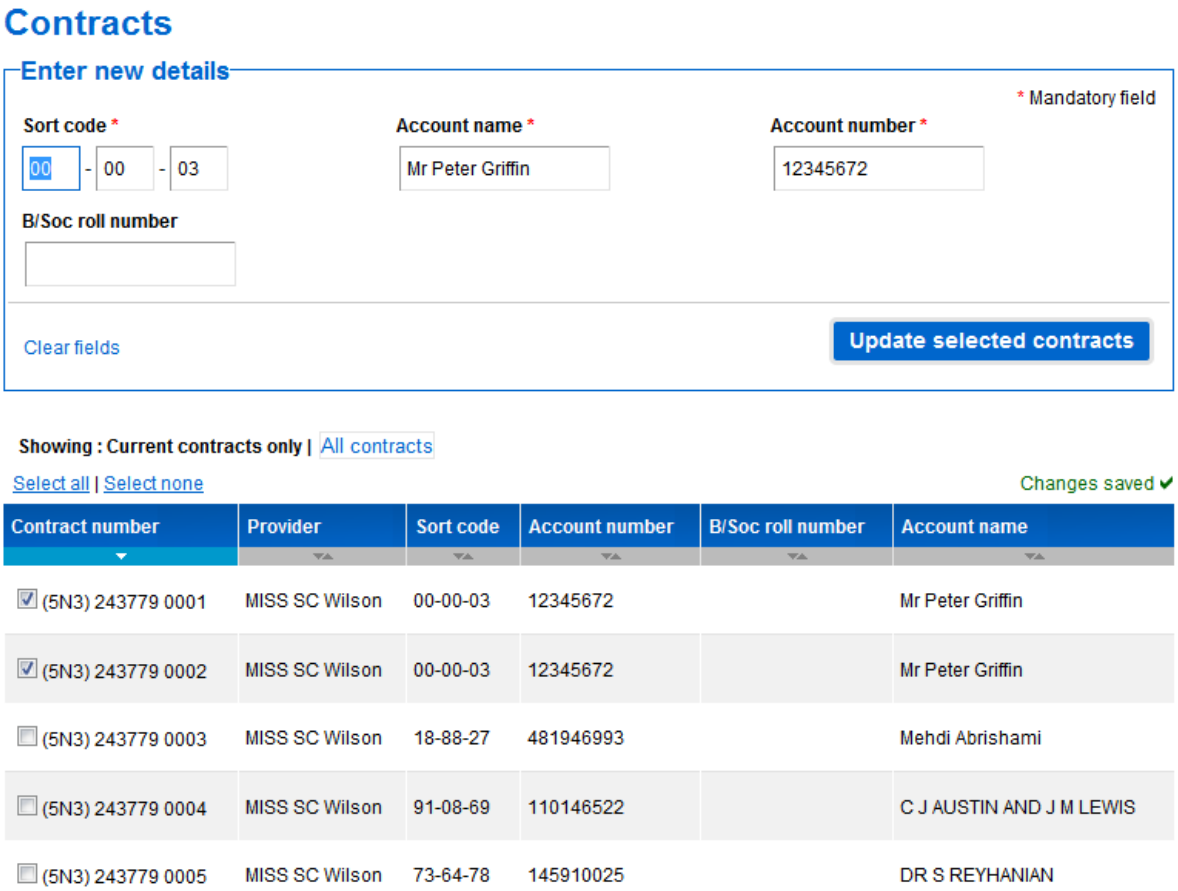



**Figure 19: manage bank details view**

Once on the manage bank details view, you may proceed and update one or many contracts with valid bank details:

1. Select the contract you wish to update by checking the checkbox(es).
    - Use the *Select all* or *Select none* button to check all or none of the contract checkboxes.
    - Use the *Current contracts only* or *All contracts* link to toggle the display between *current* and *all* contracts.
2. Enter your valid bank sort code – 6 digits.
3. Enter the account name.
4. Enter your valid bank account number – 8 digits.
5. Enter the roll number if necessary.
6. Click on the *Update selected contracts* button.
7. Confirm identify and authority to change by validating your password.
8. Confirm that you definitely want to go ahead and change the bank details (or not) by clicking *Yes* (or *No*) on the pop-up.

If validation of your account details fails (see steps 2-5), the update will fail with an error message indicating what the problem is.

If validation succeeds the corresponding bank details will be updated and an email confirmation sent to the provider email address with details of the affected contract(s).

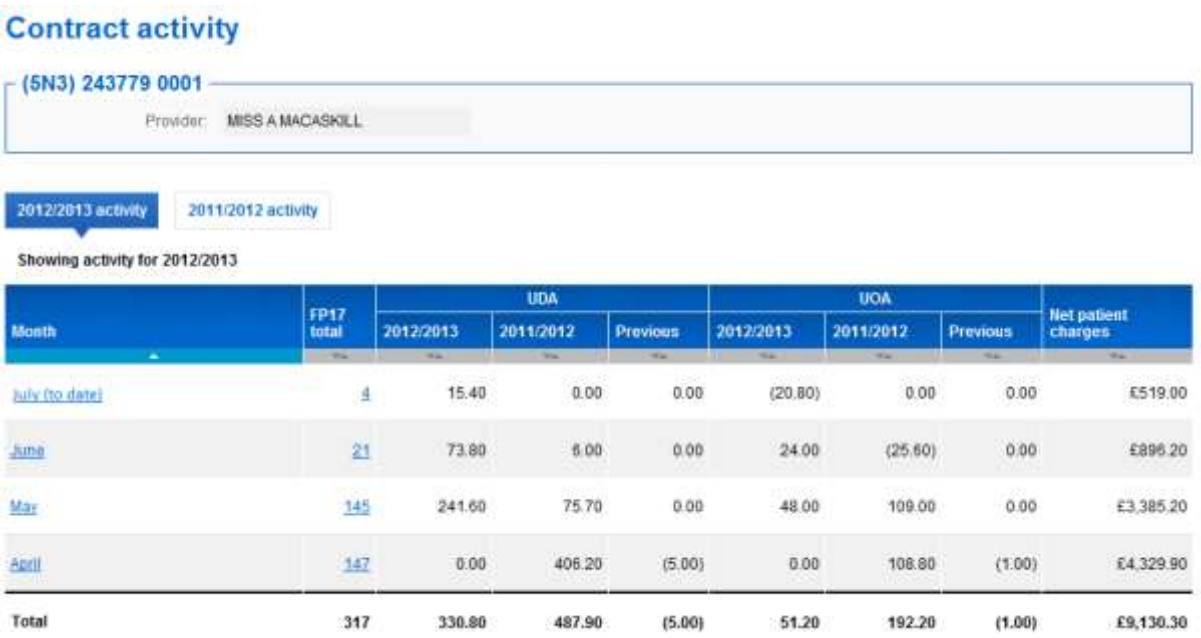
## 7.7 Contract Activity

From the Current or Find contracts views, clicking on a value in the UDA (or UOA) Scheduled or Processing columns [Figure 20] will open up the *Contract activity* page [Figure 21], for the contract (row).

| Contract number | Provider | Contract value | UDA | | | UOA | | |
|---|---|---|---|---|---|---|---|---|
| | | | Contracted | Scheduled | Processing | Contracted | Scheduled | Processing |
| (5PL) 623229 0003 | MR PJ NAVARRO LANDABURU | £141,888.08 | 1,000.00 | 0.00 | 0.00 | 2,452.00 | 82.80 | 22.20 |

**Figure 20: UDA and UOA columns**

The contract activity page displays a summary of activity against the selected contract for current or previous financial years. The financial year being viewed can be changed by clicking on the activity year button, e.g. *2012/2013 activity* in Figure 21 below.



Contract activity

(5N3) 243779 0001

Provider: MISS A MACASKILL

2012/2013 activity | 2011/2012 activity

Showing activity for 2012/2013

| Month | FP17 total | UDA | | | UOA | | | Net patient charges |
|---|---|---|---|---|---|---|---|---|
| | | 2012/2013 | 2011/2012 | Previous | 2012/2013 | 2011/2012 | Previous | |
| July (to date) | 4 | 15.40 | 0.00 | 0.00 | (20.80) | 0.00 | 0.00 | £519.00 |
| June | 21 | 73.80 | 6.00 | 0.00 | 24.00 | (25.60) | 0.00 | £896.20 |
| May | 145 | 241.60 | 75.70 | 0.00 | 48.00 | 109.00 | 0.00 | £3,385.20 |
| April | 147 | 0.00 | 406.20 | (5.00) | 0.00 | 108.80 | (1.00) | £4,329.90 |
| Total | 317 | 330.80 | 487.90 | (5.00) | 51.20 | 192.20 | (1.00) | £9,130.30 |

**Figure 21: Contract activity page**

Reading from left to right across the page we can see the following data items:

- Month
  - The schedule month for the financial year
- FP17 total
  - The total number of FP17s received for the schedule month less any adjustments (e.g. rejected or deleted claims)
- UDA 2012/2013
  - Monthly UDA activity for claims processed and dated in the current financial year
- UDA 2011/2012
  - Monthly UDA activity for claims processed and dated in the previous financial year
- UDA Previous
  - Monthly UDA activity for claims processed and dated for any time prior to the current or previous financial years

- UOA 2012/2013
    - Monthly UOA activity for claims processed and dated in the current financial year
- UOA 2011/2012
    - Monthly UOA activity for claims processed and dated in the previous financial year
- UOA Previous
    - Monthly UOA activity for claims processed and dated for any time prior to the current or previous financial years
- Net patient charges
    - The total net patient charges collected for the schedule month

As is the norm, all columns can be ordered by clicking on the column headers.

### 7.7.1 Contract Activity By Performer

We can drill down into this data still further if we wish (and if we are viewing in Provider mode). By clicking on the Month link (e.g. June) we open up the Contract activity by performer page, as shown in Figure 22.

Here we see the contract activity across all of the performers on the contract. The period being viewed is displayed above the activity table ("Showing activity for <month>"). The month can be changed by selecting a new value from the *Month* dropdown list (highlighted) and then by clicking on the Update list button.

You may return to the Contract activity summary page by clicking on the *Show annual summary* button.

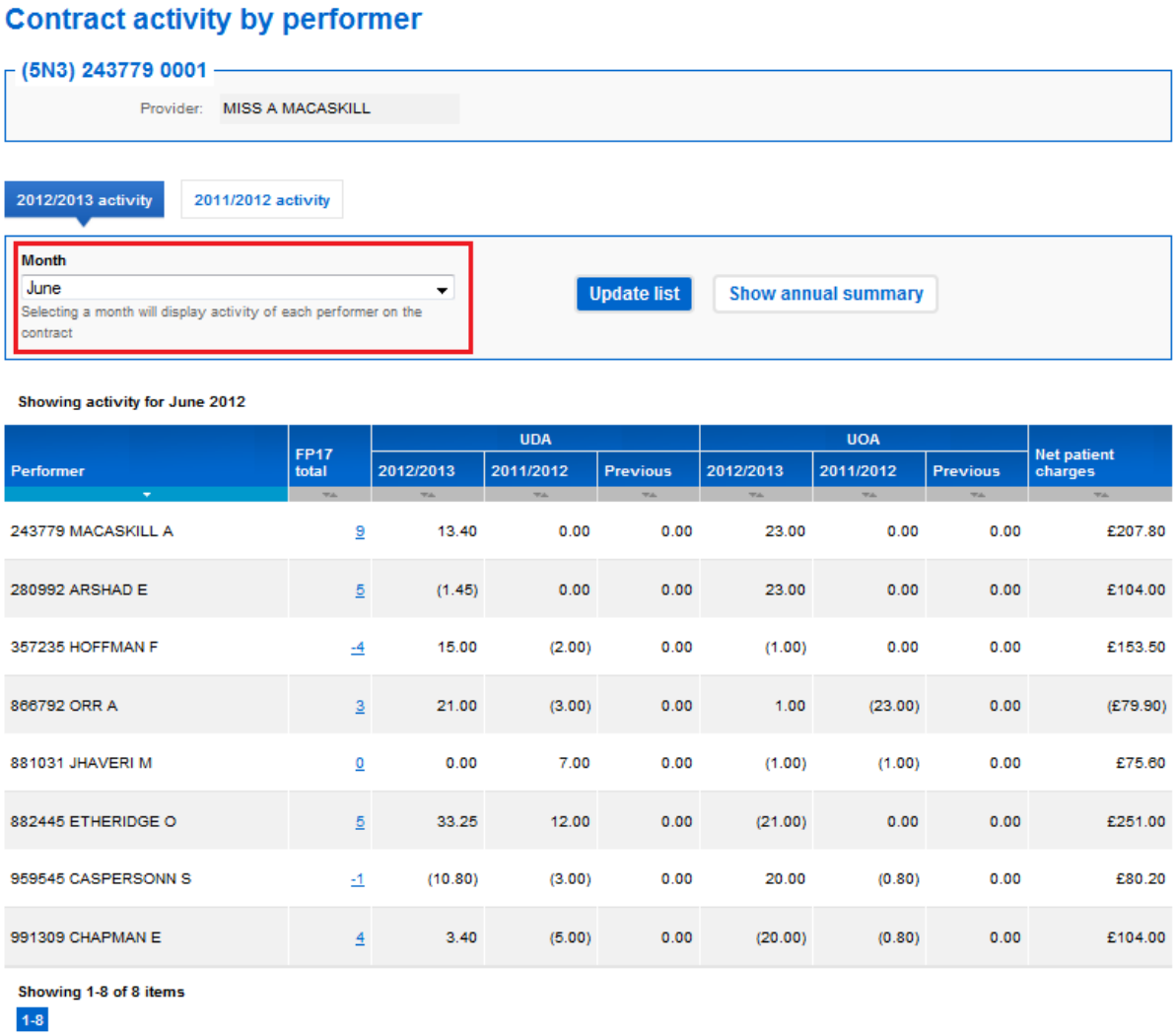

Contract activity by performer
(5N3) 243779 0001
Provider: MISS A MACASKILL
2012/2013 activity
2011/2012 activity
Month
June
Selecting a month will display activity of each performer on the contract
Update list
Show annual summary
Showing activity for June 2012
Performer
FP17 total
UDA
2012/2013
2011/2012
Previous
UOA
2012/2013
2011/2012
Previous
Net patient charges
243779 MACASKILL A 9 13.40 0.00 0.00 23.00 0.00 0.00 £207.80
280992 ARSHAD E 5 (1.45) 0.00 0.00 23.00 0.00 0.00 £104.00
357235 HOFFMAN F -4 15.00 (2.00) 0.00 (1.00) 0.00 0.00 £153.50
866792 ORR A 3 21.00 (3.00) 0.00 1.00 (23.00) 0.00 (£79.90)
881031 JHAVERI M 0 0.00 7.00 0.00 (1.00) (1.00) 0.00 £75.60
882445 ETHERIDGE O 5 33.25 12.00 0.00 (21.00) 0.00 0.00 £251.00
959545 CASPERSONN S -1 (10.80) (3.00) 0.00 20.00 (0.80) 0.00 £80.20
991309 CHAPMAN E 4 3.40 (5.00) 0.00 (20.00) (0.80) 0.00 £104.00
Showing 1-8 of 8 items
1-8

**Figure 22: Contract activity by performer (available in Provider mode only)**

### 7.7.2 FP17 forms

Clicking on the FP17 total link [Figure 23] in either the Contract activity view or in the Contract activity by performer view will open up the FP17 forms page, displaying all of the forms received for the month or by a performer for the month respectively. This view is available to both providers *and* performers.

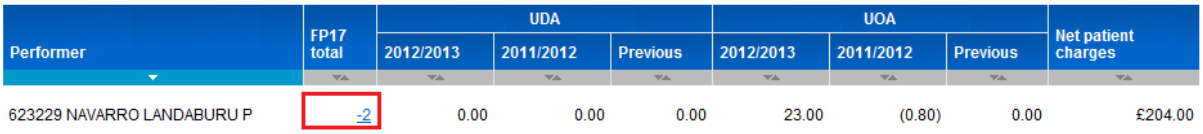



**Figure 23: FP17 Total link**

The various FP17 views are covered in more detail in section 8 FP17 below.

# 8 FP17s

## 8.1 FP17 Forms Summary by Contract

In addition to the Contract activity pages described in the previous section, claim data can be viewed in summary form by clicking on the FP17 forms navigation link, thereby opening the *FP17 forms summary by contract* view [Figure 24: FP17 forms summary by contract. This page is exactly the same whether displayed as a provider, or as a performer; however the figures displayed will be specific to

the contract-performer (when viewed in performer mode) or to the contract (i.e. across all performers) when viewed in provider mode.

**Figure 24: FP17 forms summary by contract**

Again, the columns displayed are much the same as those detailed for the Contract activity pages but with summarised totals instead of the more granular activity shown in the by-month or by-performer views:

- Contract Number
  - Your contracts for which there is current activity.
- Provider
  - The contract provider.
- Total forms
  - The total number of FP17s received for the schedule month less any adjustments (e.g. rejected or deleted claims)
- UDA 2012/2013
  - Monthly UDA activity for claims processed and dated in the current financial year
- UDA 2011/2012
  - Monthly UDA activity for claims processed and dated in the previous financial year
- UDA Previous
  - Monthly UDA activity for claims processed and dated for any time prior to the current or previous financial years
- UOA 2012/2013
  - Monthly UOA activity for claims processed and dated in the current financial year
- UOA 2011/2012
  - Monthly UOA activity for claims processed and dated in the previous financial year
- UOA Previous
  - Monthly UOA activity for claims processed and dated for any time prior to the current or previous financial years
- Net patient charges
  - The total net patient charges collected for the current schedule month

## 8.2 Current FP17 Forms

As per the Contract activity pages covered earlier, we can click on the FP17 *Total forms* value to drill down and view the actual claims received. Doing so opens up the Current FP17 forms page - Figure 25 below.

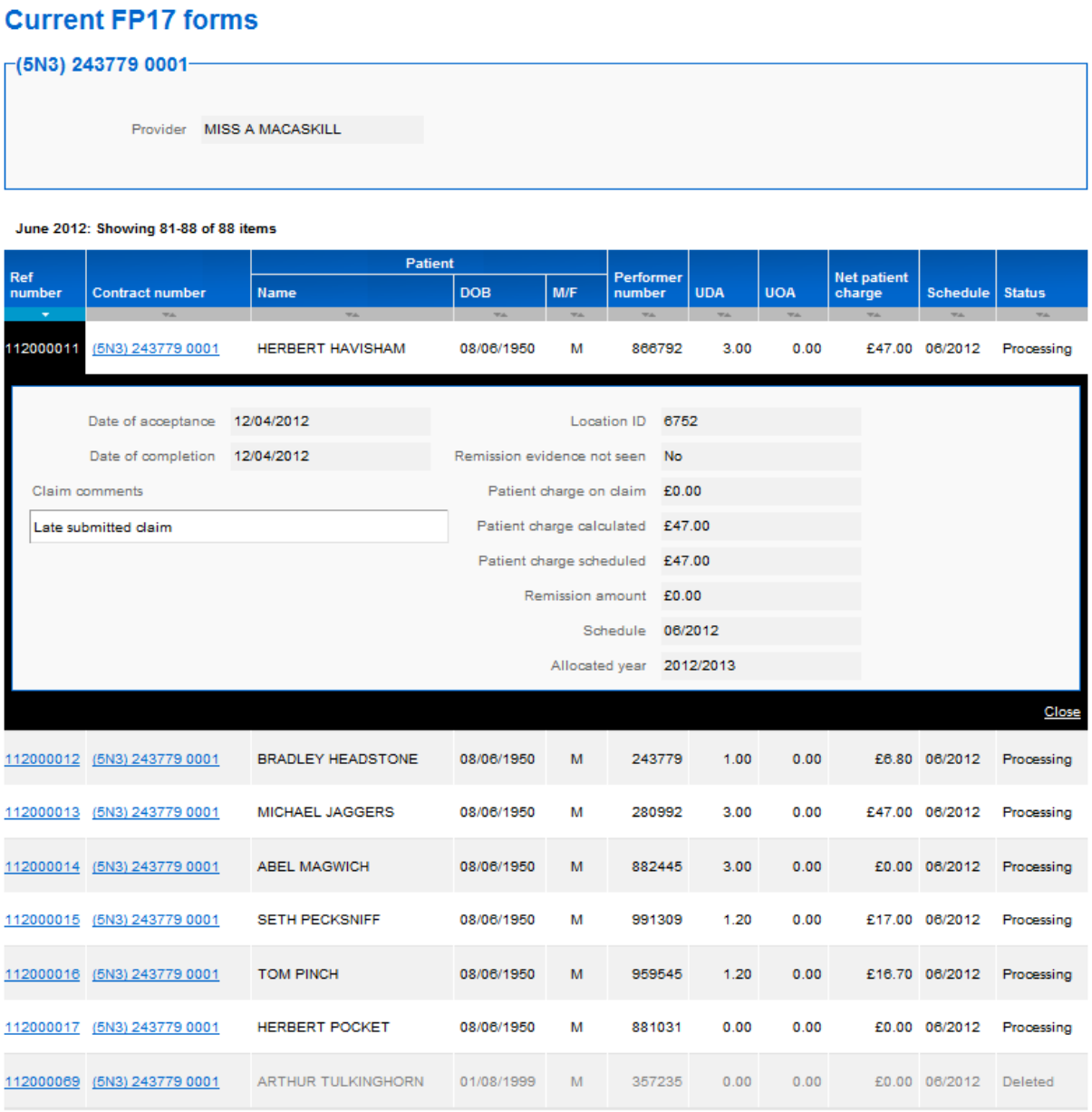

Current FP17 forms
(5N3) 243779 0001
Provider MISS A MACASKILL
June 2012: Showing 81-88 of 88 items
Ref number
Contract number
Patient
Name
DOB
M/F
Performer number
UDA
UOA
Net patient charge
Schedule
Status
112000011 (5N3) 243779 0001 HERBERT HAVISHAM 08/06/1950 M 866792 3.00 0.00 £47.00 06/2012 Processing
Date of acceptance 12/04/2012
Date of completion 12/04/2012
Claim comments
Late submitted claim
Location ID 6752
Remission evidence not seen No
Patient charge on claim £0.00
Patient charge calculated £47.00
Patient charge scheduled £47.00
Remission amount £0.00
Schedule 06/2012
Allocated year 2012/2013
Close
112000012 (5N3) 243779 0001 BRADLEY HEADSTONE 08/06/1950 M 243779 1.00 0.00 £6.80 06/2012 Processing
112000013 (5N3) 243779 0001 MICHAEL JAGGERS 08/06/1950 M 280992 3.00 0.00 £47.00 06/2012 Processing
112000014 (5N3) 243779 0001 ABEL MAGWICH 08/06/1950 M 882445 3.00 0.00 £0.00 06/2012 Processing
112000015 (5N3) 243779 0001 SETH PECKSNIFF 08/06/1950 M 991309 1.20 0.00 £17.00 06/2012 Processing
112000016 (5N3) 243779 0001 TOM PINCH 08/06/1950 M 959545 1.20 0.00 £16.70 06/2012 Processing
112000017 (5N3) 243779 0001 HERBERT POCKET 08/06/1950 M 881031 0.00 0.00 £0.00 06/2012 Processing
112000069 (5N3) 243779 0001 ARTHUR TULKINGHORN 01/08/1999 M 357235 0.00 0.00 £0.00 06/2012 Deleted

**Figure 25: Current FP17 forms**

All information relating to the FP17 claims is displayed here:

- Reference number
    - The reference number can be either the image index number or the EDI claim reference number dependent upon the processing route.
    - Clicking on the reference number opens up the claim details view, as shown above [Figure 25].
- Contract number
- Patient name (surname, forename)
- Patient date of birth

- Patient gender
- Performer personal number
    - The performer associated with the claim
- UDA
- UOA
- Net Patient charge
- Schedule number
    - The schedule month/year against which the FP17 is assigned
- Status (i.e. 'Processed', 'Deleted' or 'Rejected')

It's important to note that this screen can be viewed via several routes, each one with a slightly different perspective on the overall FP17s picture so, as demonstrated in Figure 26, the FP17 total for the *current* month could be viewed by following various paths:

- Current contracts
    - Contract activity (via UDA/UOA link for contract)
        - FP17 total for month (via month (to date) link).

Alternatively:

- FP17 forms summary by contract
    - FP17 total for month (via Total forms link).

The month and year values are always displayed above the results table to serve as a reminder of which FP17 view is currently being displayed.

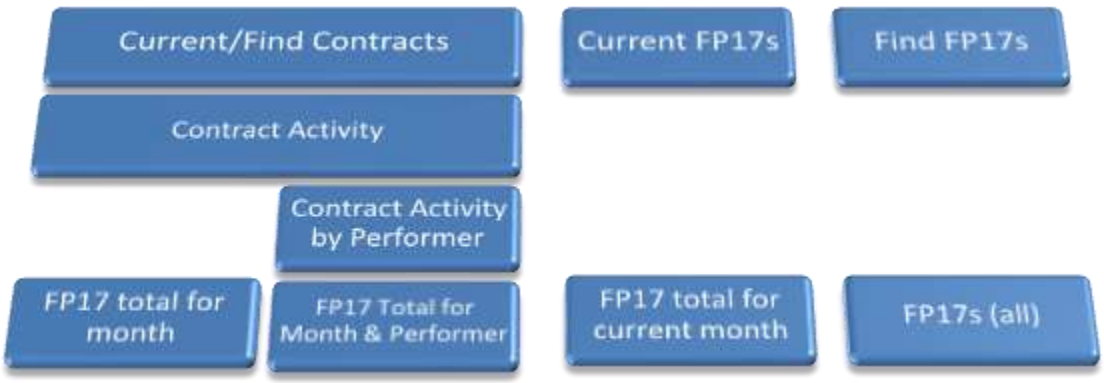



**Figure 26: FP17 reporting routes**

A model of the various paths and corresponding links is included as an appendix - section 14. You can use this to learn how the various contract activity and FP17 pages are related to each other and the links that are used in order to navigate to them.

## 8.3 Find FP17s

FP17s can also be searched for via the Find FP17s link, which opens the Find and View FP17s page, Figure 27.

The number of FP17s being seared for can and should be filtered by using the various search options listed below.

- Health Bodies
    - Restrict search to a single health body by selecting one from the drop down list and then clicking the *Update list* button.
- Contract Numbers
    - Restrict search to a single contract number.
- FP17 form status
    - Restrict search to FP17s with a specific status.
- Schedule number *from*
    - Refine the FP17 *schedule* dates between which you would like to search – e.g. selecting dates *starting between* 04/2010 *and* 06/2010 will return claims that were processed in schedules 04/2010, 05/2010 and 06/2010.
- Performer names
    - Restrict search to a single performer
- Patient Surname
    - Search by patient surname
- Patient Forename
    - Search by patient forename
- Patient DOB
    - Search by patient date of birth
- FP17 Form Received between
    - Refine the FP17 *receipt* dates between which you would like to search – e.g. selecting dates *ending between* 01/09/2011 *and* 28/02/2011 will return claims that were received on or between the two selected dates.
- Acceptance Date Between
    - Refine the FP17 *acceptance* dates between which you would like to search – e.g. selecting dates *ending between* 01/05/2012 *and* 30/05/2012 will return claims that were accepted on or between the two selected dates.
- Completion Date Between
    - Refine the FP17 *completion* dates between which you would like to search – e.g. selecting dates *ending between* 01/01/2012 *and* 01/03/2012 will return claims that completed on or between the two selected dates.

**Due to the large number of claims in the system, searches for claims without sufficiently restrictive criteria may take some time (upwards of 1 minute) to complete.**

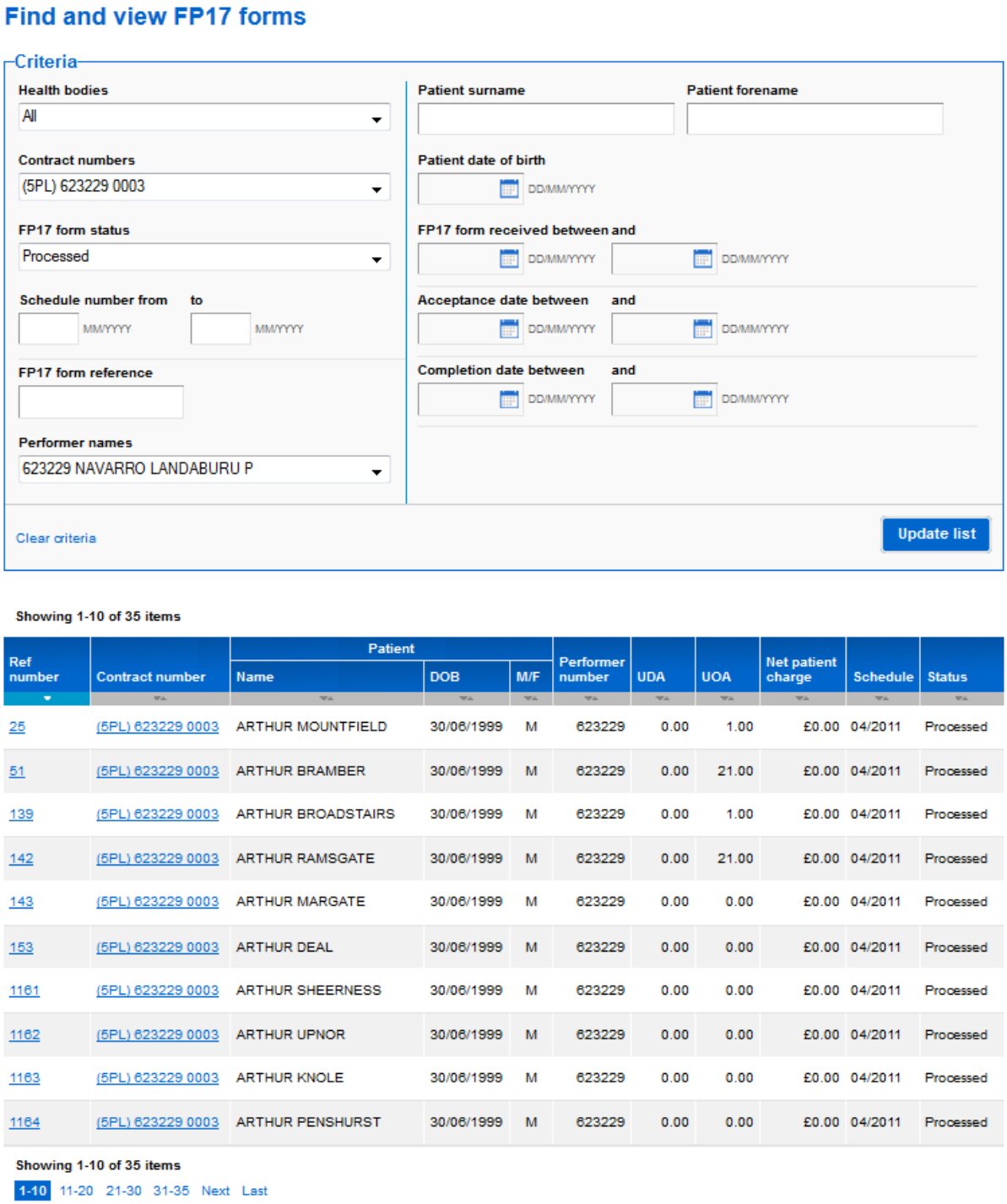

Find and view FP17 forms
Criteria
Health bodies
All
Contract numbers
(5PL) 623229 0003
FP17 form status
Processed
Schedule number from
to
MM/YYYY
FP17 form reference
Performer names
623229 NAVARRO LANDABURU P
Patient surname
Patient forename
Patient date of birth
DD/MM/YYYY
FP17 form received between and
Acceptance date between and
Completion date between and
Clear criteria
Update list
Showing 1-10 of 35 items
Ref number
Contract number
Patient
Name
DOB
M/F
Performer number
UDA
UOA
Net patient charge
Schedule
Status
25 (5PL) 623229 0003 ARTHUR MOUNTFIELD 30/06/1999 M 623229 0.00 1.00 £0.00 04/2011 Processed
51 (5PL) 623229 0003 ARTHUR BRAMBER 30/06/1999 M 623229 0.00 21.00 £0.00 04/2011 Processed
139 (5PL) 623229 0003 ARTHUR BROADSTAIRS 30/06/1999 M 623229 0.00 1.00 £0.00 04/2011 Processed
142 (5PL) 623229 0003 ARTHUR RAMSGATE 30/06/1999 M 623229 0.00 21.00 £0.00 04/2011 Processed
143 (5PL) 623229 0003 ARTHUR MARGATE 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
153 (5PL) 623229 0003 ARTHUR DEAL 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
1161 (5PL) 623229 0003 ARTHUR SHEERNESS 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
1162 (5PL) 623229 0003 ARTHUR UPNOR 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
1163 (5PL) 623229 0003 ARTHUR KNOLE 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
1164 (5PL) 623229 0003 ARTHUR PENSHURST 30/06/1999 M 623229 0.00 0.00 £0.00 04/2011 Processed
Showing 1-10 of 35 items
1-10 11-20 21-30 31-35 Next Last

**Figure 27: Find FP17s page**

## 9 NHS PENSIONS - ANNUAL RECONCILIATION REPORTS (ARR)

At the end of each financial year it is necessary to carry out a reconciliation exercise to ensure that the actual net pensionable earnings (NPE) or net pensionable earnings equivalent (NPEE) for each performer are recorded and validated.

Prior to April 2013 it was the PCT's and NHSBSA's responsibility to collate this information from providers and record it within the NHSBSA systems. It is now the responsibility for providers and performers to record this information for themselves, making the process transparent for all parties.

The end of year declarations will be made available to all providers and performers on the portal from the 1 April. Providers and performers are encouraged to confirm their NPE or NPEE directly with each other which makes the reconciliation process simple for all parties. Once agreement has been achieved the figures can be recorded on the Portal.

The Portal application is available to all providers and performers within England and Wales, the superannuation functionality caters for:-

Provider and Performer online
Provider is online and Performer is offline
Provider is offline and Performer is online
Provider and Performer are offline

Where a provider or a performer does not have an active Portal account a paper ARR will be sent and their declarations will be managed by the NHSBSA.

### 9.1 Provider Process

Providers will be given the option to accept or enter an alternative figure for each of their performers on each contract they own. The total NPE and NPEE figures entered against each contract cannot exceed 43.9% of the total contract value, an error message will be displayed to the user if this occurs and it will be the responsibility of the provider to correct the figures accordingly. When the provider is satisfied with the figures they will be requested to confirm and declare all figures entered, at this point emails will be sent out to each performer on the contract if they have an active Portal account. The email will inform the performer to log into the Portal and assess their figures.

A performer will then be able to log onto the Portal and accept or reject the figure a provider has entered. If a performer rejects the figure they will be forced to enter an alternative value. When a performer enters a response an email notification will be send to the provider if they have an active portal account.

### 9.2 Performer Process

Performers are required to respond to the figures that have been entered on the Portal before the declaration deadline (30 June each financial year). Once a response has been made an email notification will be sent to the provider if the provider has an active Portal account.

### 9.3 Provider Administrator View

Providers can set up administrator users who can have the ability to view and update the superannuation declarations on behalf of their provider. When updates are confirmed an email notification will be sent to each performer on the contract that has an active Portal account.

### 9.4 Year End Superannuation Reconciliation

If a provider or performer cannot come to an agreement by the declaration deadline (30 June each financial year) a set of business rules will be applied across the contract, if the business rules fail the NPE/NPEE applied throughout the year will be used as the final figure and a pension statement will be issued to the performer.

Any contribution adjustments will be effected in the next available Pay Statement/Superannuation Notification. The Pension Statement (SD86C) containing the confirmed superannuable figures will be viewable via the Portal. It is worth noting at this point that the Pension Statement will contain all pensionable earnings from all contracts that a practitioner works on.

### 9.5 Guidance for Completing Annual Reconciliation Report

A full guide to completing your Annual Reconciliation Reports can be found http://www.nhsbsa.nhs.uk/2026.aspx.

### 9.6 Post Annual Reconciliation Process

If you need to make any amendments to your declared Annual Reconciliation Report (ARR) after the declaration deadline (30 June each financial year), you can do so through the *Post Annual Reconciliation Process.* This process should only be used to amend incorrect net pensionable earnings (NPE) and net pensionable earnings equivalent (NPEE) figures previously declared in the ARR process.

This process applies to both current and previous financial years but will only be available from the beginning of July to the end of March each financial year.

The post ARR process works in a similar way to the ARR process described in sections 9.1 and 9.2 above, however you will be asked to provide a *Reason for Resubmission* when you *Declare your acceptance of the figure(s).*

## **10** PAY STATEMENTS

The Pay statements view enables a performer user to search for and download their Pay statements, whilst a provider user can search for and download the Pay statements for themselves and those of their performers.

Performers have the option to;

- Select a contract from the list
- Click on the *Show details* button
- A list of the available pay statements are displayed for the highlighted financial year [Figure 28a].

Providers have the option to;

- Select a contract from the list
- Click on the *Show my statements* button to see the provider's Pay statements

Or

- Select a contract from the list
- Click on *Show performers* button to access your performers' Pay statements
- Select a performer from the list
- A list of the available pay statements for the performer are displayed for the highlighted financial year [Figure 28b]

Clicking on the report *month* link in the Month column will spawn a new web internet browser window with options to:

- Open
    - Open the file for immediate viewing (additional software e.g. Adobe Reader may be required for this action).
- Download
    - Save the file to your PC (check your downloads folder or specify a location).

**Please note that downloads to your PC should not be considered private.**

- Cancel
    - Take no further action and exit the new window.

The pay statements list consists of three columns:

- Month
    - Identifies the month to which the pay statement pertains.
    - Opens download window in internet browser if clicked on.
- Pay statement and Schedule
    - Indicates type of pay statement - examples in Table 1 below:

| Month | Pay Statement | Schedule | Description |
|---|---|---|---|
| March | Yes | Yes | Pay Statement |
| March | Yes | No | Copy Pay Statement |
| February | Yes | Yes | Cleared previous month pay statement |
| January | No | Yes | Schedule |
| December | Yes | Yes | Released payment statement |
| November | Yes | No | Extra payment statement |

**Table 1: Pay Statement *type* examples**

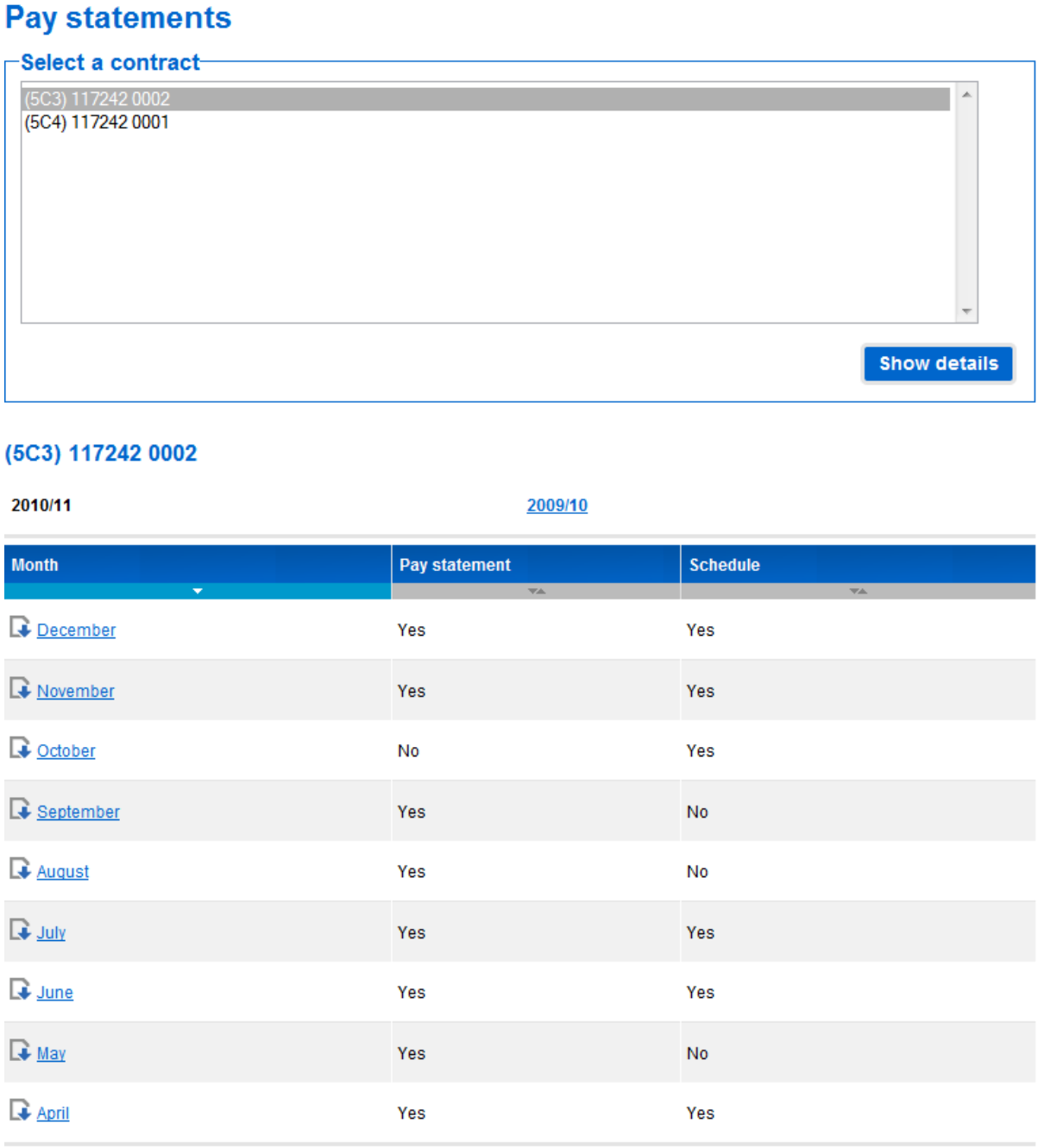



**Figure 28a: pay statements**

The selected financial year can be changed by clicking on the year link (e.g. 2009/10 above); however the link will only appear **if** there are reports held for the year. If for example there are no reports held for 2009/10, for the contract selected – the financial year link will not be visible.

Equally, if a report is not available for e.g. January, this will not appear in the list – as per Figure 28a.

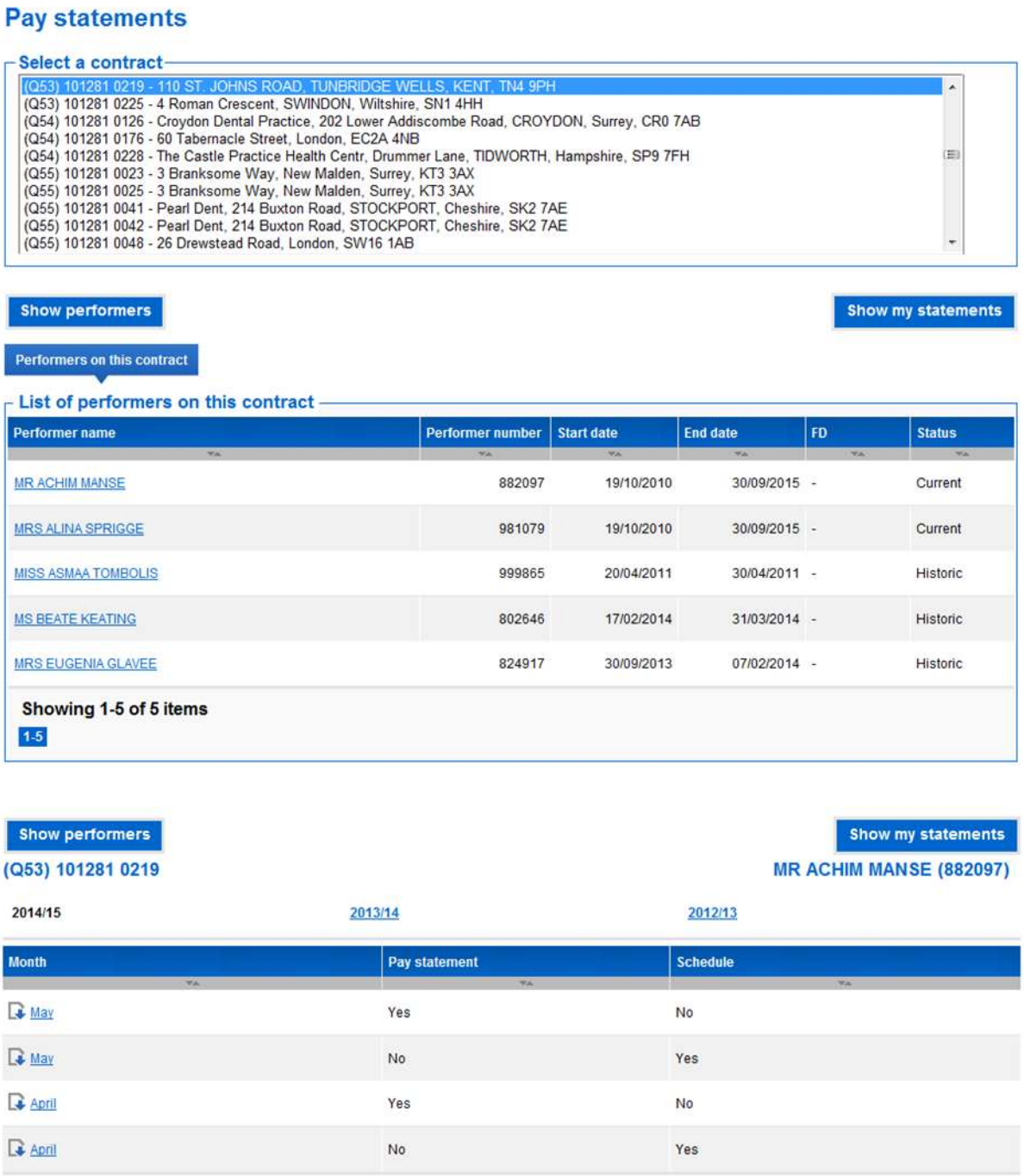

Pay statements
Select a contract
(Q53) 101281 0219 - 110 ST. JOHNS ROAD, TUNBRIDGE WELLS, KENT, TN4 9PH
(Q53) 101281 0225 - 4 Roman Crescent, SWINDON, Wiltshire, SN1 4HH
(Q54) 101281 0126 - Croydon Dental Practice, 202 Lower Addiscombe Road, CROYDON, Surrey, CR0 7AB
(Q54) 101281 0176 - 60 Tabernacle Street, London, EC2A 4NB
(Q54) 101281 0228 - The Castle Practice Health Centr, Drummer Lane, TIDWORTH, Hampshire, SP9 7FH
(Q55) 101281 0023 - 3 Branksome Way, New Malden, Surrey, KT3 3AX
(Q55) 101281 0025 - 3 Branksome Way, New Malden, Surrey, KT3 3AX
(Q55) 101281 0041 - Pearl Dent, 214 Buxton Road, STOCKPORT, Cheshire, SK2 7AE
(Q55) 101281 0042 - Pearl Dent, 214 Buxton Road, STOCKPORT, Cheshire, SK2 7AE
(Q55) 101281 0048 - 26 Drewstead Road, London, SW16 1AB
Show performers
Show my statements
Performers on this contract
List of performers on this contract
Performer name
Performer number
Start date
End date
FD
Status
MR ACHIM MANSE 882097 19/10/2010 30/09/2015 - Current
MRS ALINA SPRIGGE 981079 19/10/2010 30/09/2015 - Current
MISS ASMAA TOMBOLIS 999865 20/04/2011 30/04/2011 - Historic
MS BEATE KEATING 802646 17/02/2014 31/03/2014 - Historic
MRS EUGENIA GLAVEE 824917 30/09/2013 07/02/2014 - Historic
Showing 1-5 of 5 items
1-5
Show performers
Show my statements
(Q53) 101281 0219
MR ACHIM MANSE (882097)
2014/15
2013/14
2012/13
Month
Pay statement
Schedule
May Yes No
May No Yes
April Yes No
April No Yes

**Figure 29b: pay statements**

# 11 REPORTS

The Reports page enables provider and performer users to search for and download reports or pension statements respectively.

## 11.1 Provider Reports

Navigating to the reports view [Figure 30] as a provider (remember the performer-provider switch [page 10] if you need to change view) equips you with several search and filter mechanisms, listed below:

- Type
    - Filter search by report type –
    - Annual Activity Report
    - General Vital Signs
    - Orthodontic Vital Signs
- Within financial year
    - Filter search by financial year.
- Within financial period
    - Filter search by report period –
        1. Monthly
        2. Quarterly
        3. Mid and Year end.
- Contract number
    - Filter search by contract.

*Note: If there are no instances of a report type, year or period the checkbox filter will not appear for the associated filter mechanism (checkbox).*

The filters can be combined in order to refine your search as per the example [Figure 30] below:

- Search filter = {Annual Activity Report, 2011-2012, (5C3) 117242 0002}

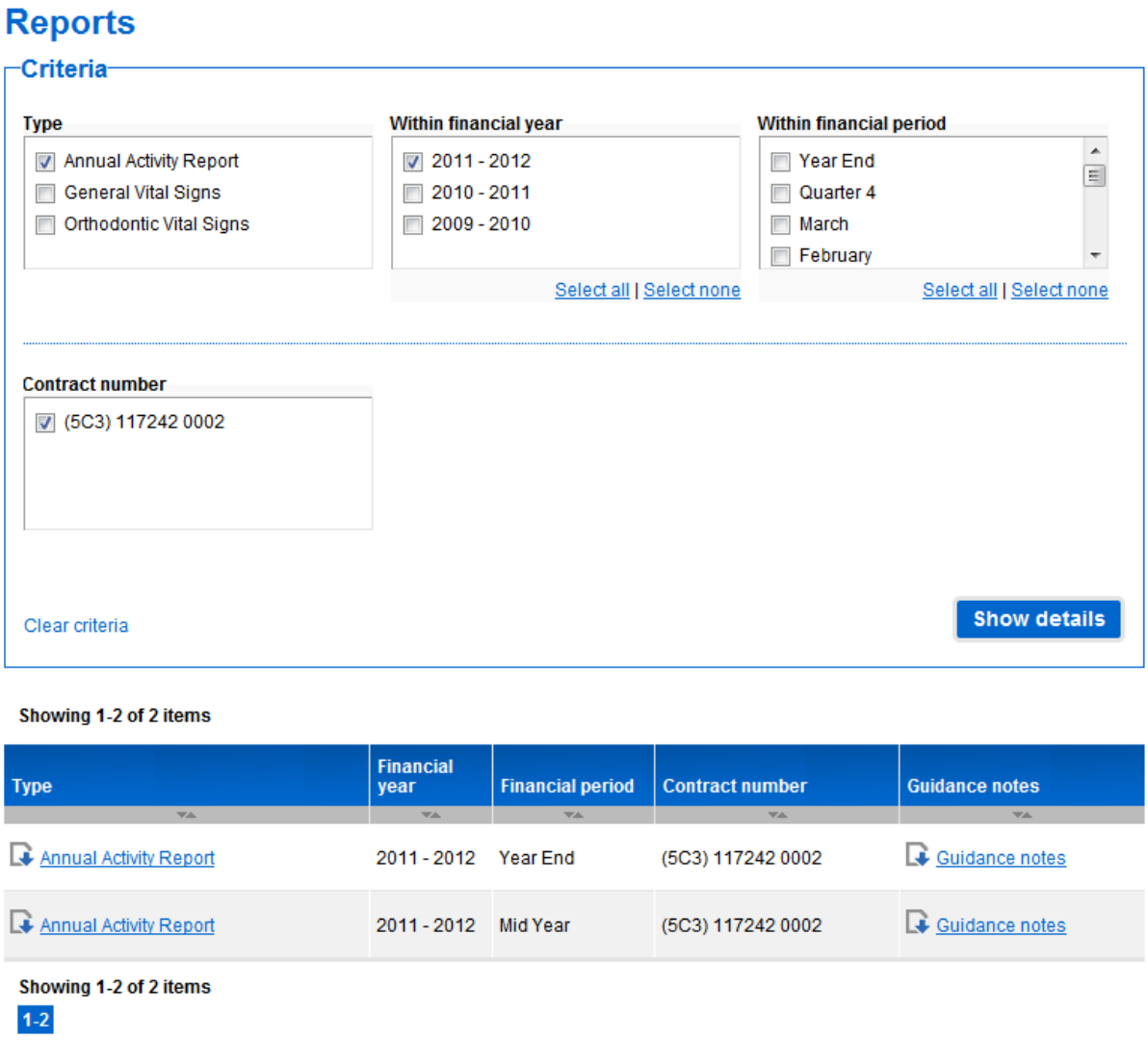



**Figure 30: provider reports example**

The *Select all* and *Select none* links can be used to check/uncheck all filter checkboxes as required. The *clear criteria* button wipes out any changes made so you can start again.

The results table consists of the following columns:

- Type
    - The type of report to be downloaded
    - Clicking on the report name opens the internet browser download window with options to Open, Download or Cancel.
- Financial year
    - The financial year to which the report refers.
- Financial period
    - The financial period to which the report refers.
- Contract number
    - The contract number to which the report refers.
- Guidance notes
    - Guidance notes for the report to be downloaded.

- Clicking on the link opens the internet browser download window with options to Open, Download or Cancel.

### 11.2 Performer Reports

When viewing reports as a performer, only the financial year can be used to filter the reports since only one type of report is available – the Personal Superannuation Statement, displayed by selecting one or more financial years and clicking the *Show details* button.

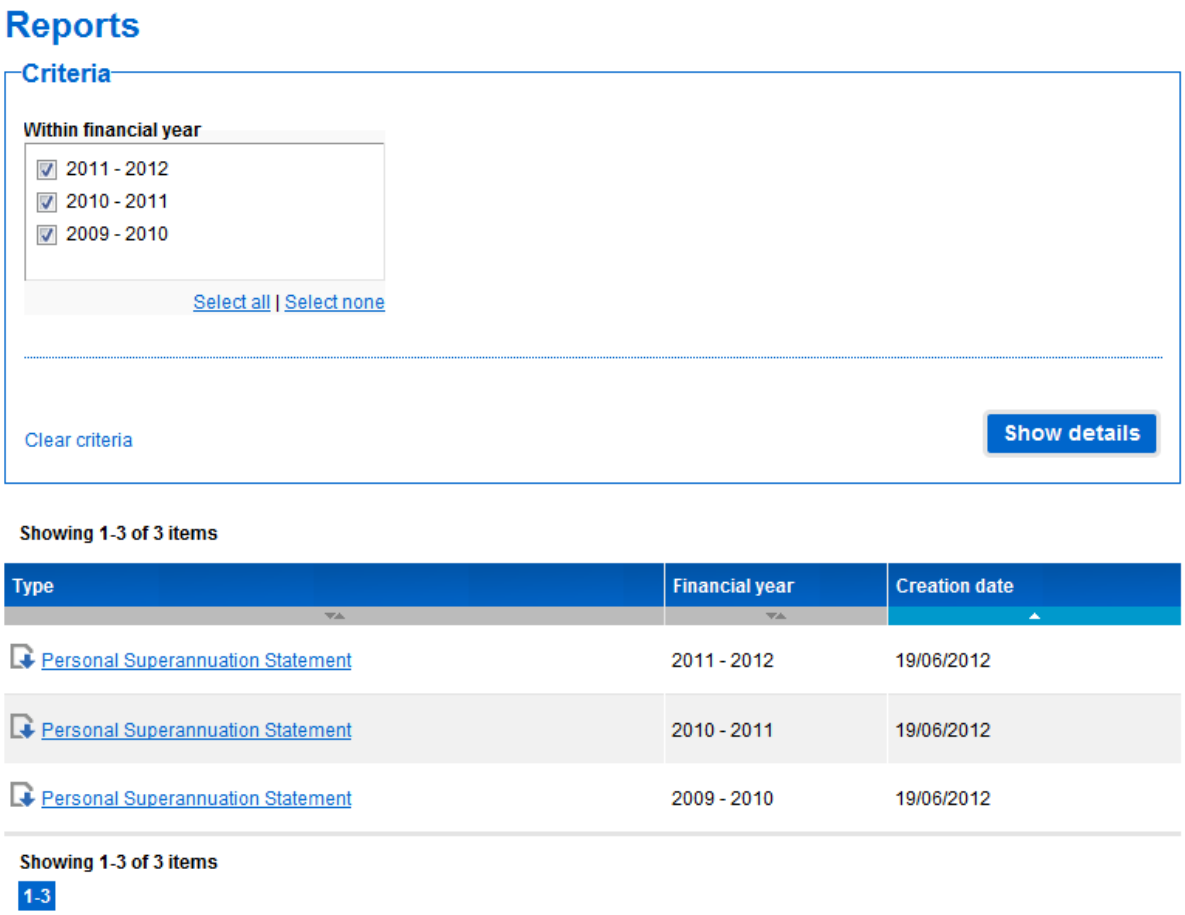



**Figure 31: performer reports**

The statements can be downloaded by clicking on the *Personal Superannuation Statement* link.

## 12 EDI PIN

Your EDI PIN or temporary EDI PIN can be requested via the EDI PIN page. Once again, the facilities available to you on this page will vary depending on whether you are a provider or a performer.

### 12.1 Provider EDI PIN

The EDI PIN page when viewed as a provider will enable you to request temporary EDI PINs for performers associated with your contracts. Their performer number and name is displayed along with a request EDI PIN link [Figure 32: ]. Before requesting an EDI Temporary PIN for one of your performers you will need to know the Site Number that they transmit from. The temporary PIN will allow you to submit outstanding claims for a performer who is no longer at the practice.

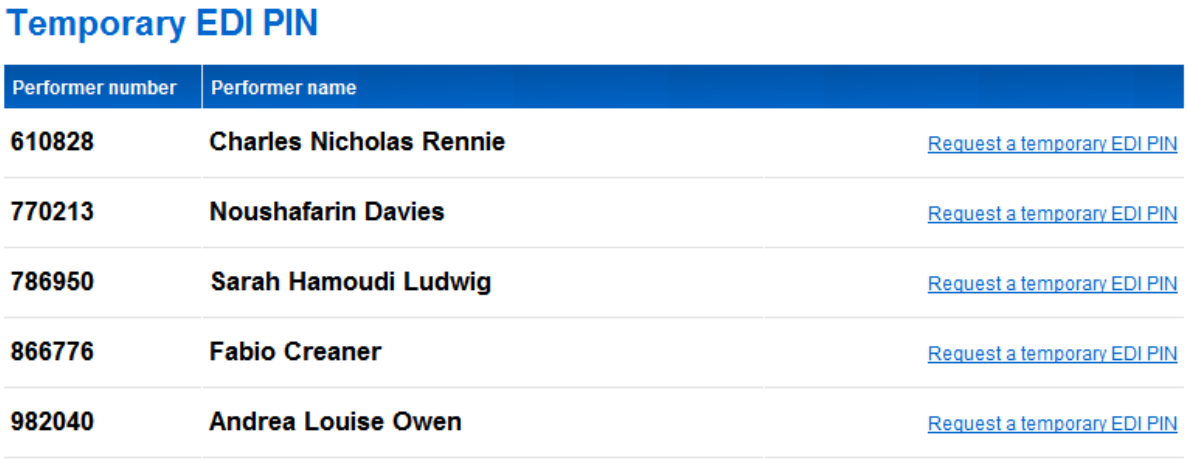



**Figure 32: Provider request temporary EDI PIN for Performer initial page**

Selecting a performer and then clicking on the *Request a temporary EDI PIN* link will open a new page [Figure 33] in which you may specify the site number for which the temporary EDI PIN is required.

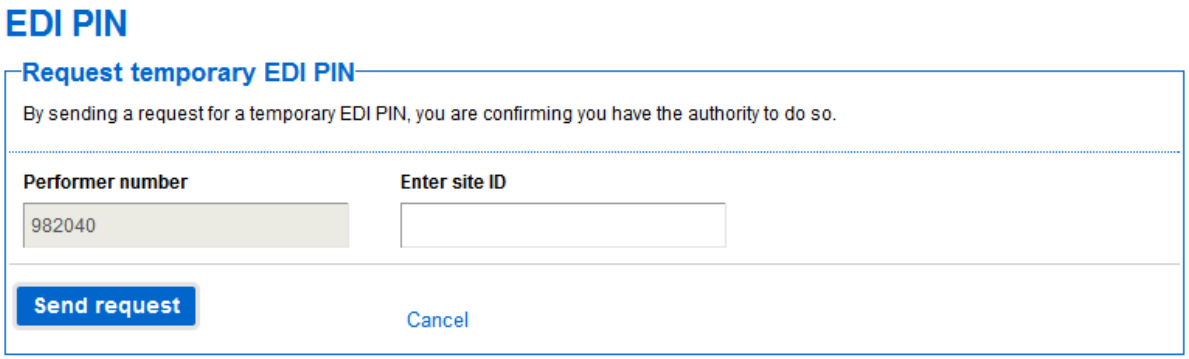

EDI PIN
Request temporary EDI PIN
By sending a request for a temporary EDI PIN, you are confirming you have the authority to do so.
Performer number
982040
Enter site ID
Send request
Cancel

**Figure 33: Provider requests temporary EDI PIN for Performer**

After entering the site number and clicking the *Send request* button, the Portal will ask for password confirmation. Having completed this, the temporary EDI PIN request will be sent for processing.

Alternatively you may discontinue the request at any stage by clicking the *Cancel* button.
If an additional PIN(s) is required for the same performer then further requests can be made, providing they are not for the same site number.

Once the request has been sent you will be returned to the Temporary EDI PIN page with a confirmation of request(s) displayed [Figure 34]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the Portal.

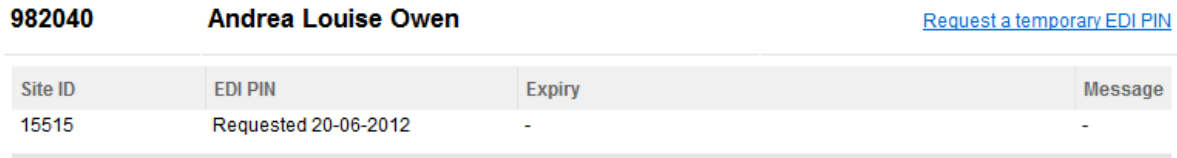



**Figure 34: temporary EDI PIN request confirmation**

After the request has been processed, you will receive an email confirming the request outcome (normally within approximately 24 hours) – *EDI PIN created* or *EDI PIN request rejected*. The outcome can also be verified (with the rejection reason if the request failed) on the Portal EDI PIN page as per Figure 35 below.

- Performer 280992 has 2x EDI PIN requests logged –
    - The pin for site 12345 has been rejected.

- The pin for site 54321 has been approved and is listed [2222] alongside the *temporary* PIN expiry date – 30-07-2012.

- Performer 770213 has 1x EDI PIN request logged –
  - The PIN for site 12345 has been approved [1111] and expires 30-07-2012.

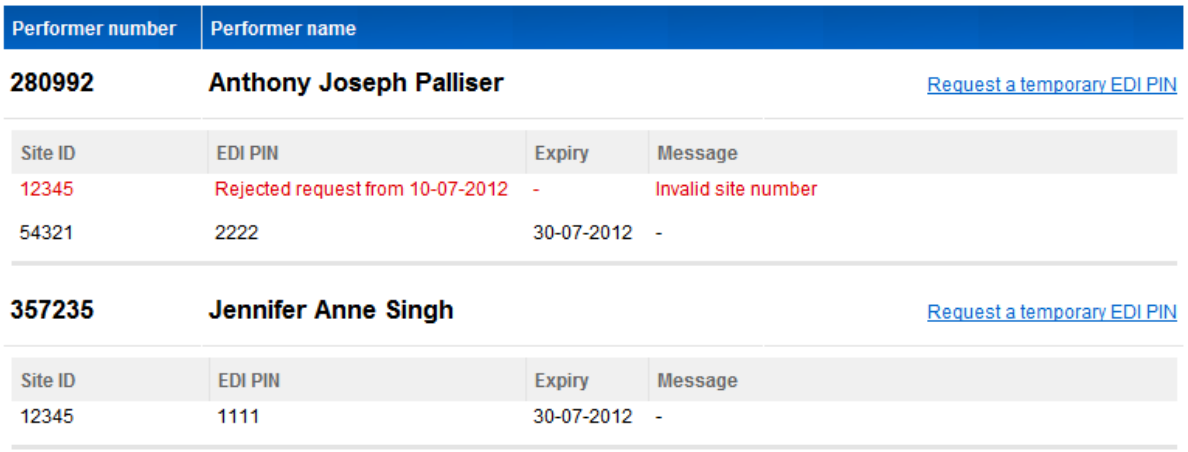



**Figure 35: temporary EDI PIN status**

## 12.2 Performer EDI PIN

As a performer the EDI PIN request relates to your personal EDI PIN number. As such, the page appearance is slightly less complex [Figure 36].

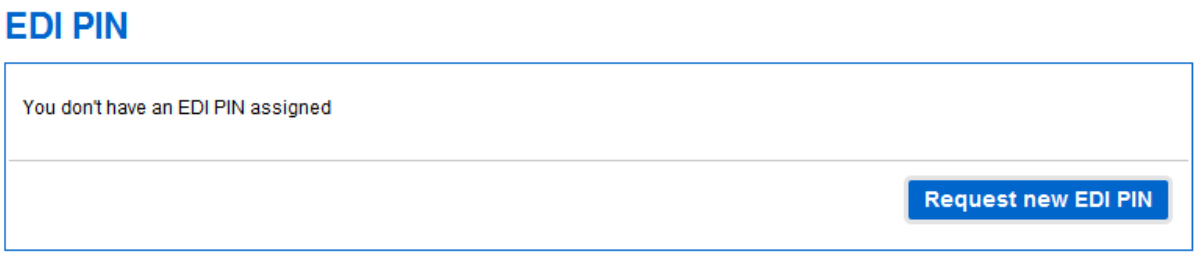



**Figure 36: performer EDI PIN view**

Clicking on the Request new EDI PIN button will redirect you to the confirm password page. Once your credentials have been verified the request will be logged [Figure 37]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the Portal.

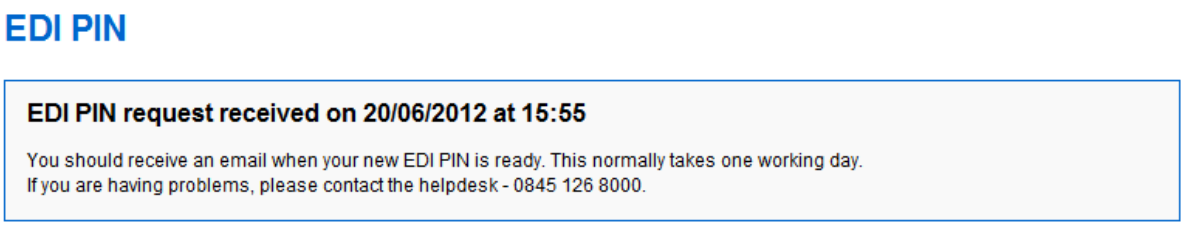

EDI PIN
EDI PIN request received on 20/06/2012 at 15:55
You should receive an email when your new EDI PIN is ready. This normally takes one working day.
If you are having problems, please contact the helpdesk - 0845 126 8000.

**Figure 37: performer EDI PIN request confirmation**

Once the request has been processed you will receive an email notification of the outcome, success or failure. You may view the EDI PIN page to obtain the PIN if the request was successful [Figure 38] or the rejection reason [Figure 39] if it could not be processed.

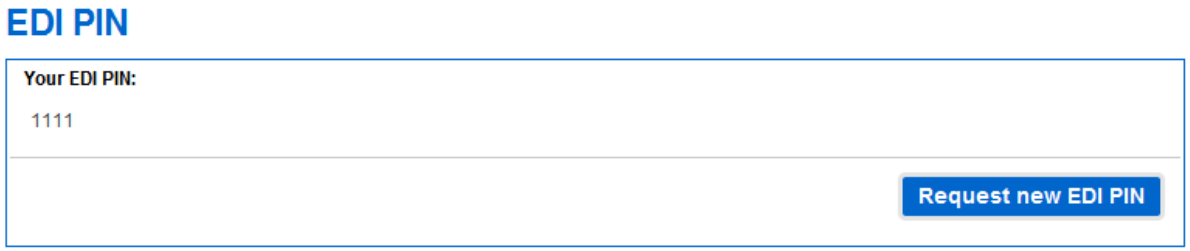



**Figure 38: performer EDI PIN**

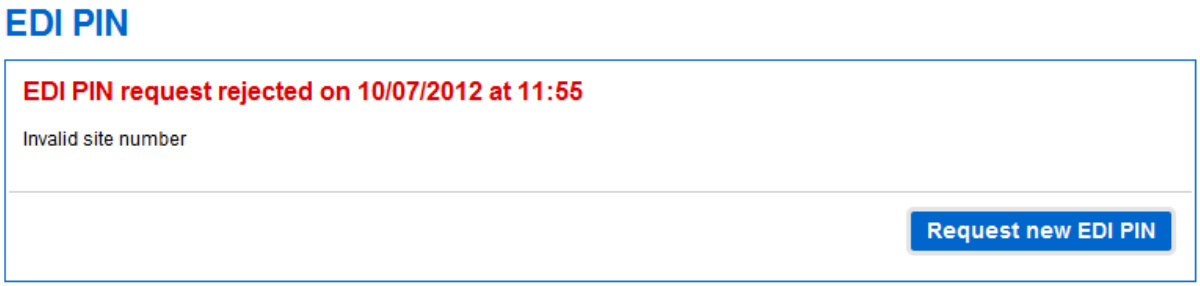



**Figure 39: rejected performer EDI PIN**

## 13 USER MANAGEMENT

It is possible for Providers to create additional user accounts and assign privileges and restrictions for the administration of various tasks within the Portal. Providers can create and manage their administrator-users on the User management page.

### 13.1 Create an Administrator

The first time you navigate to the View and maintain user's page it will look like Figure 40 below. Once some administrator users have been created, we'll see a bit more activity.

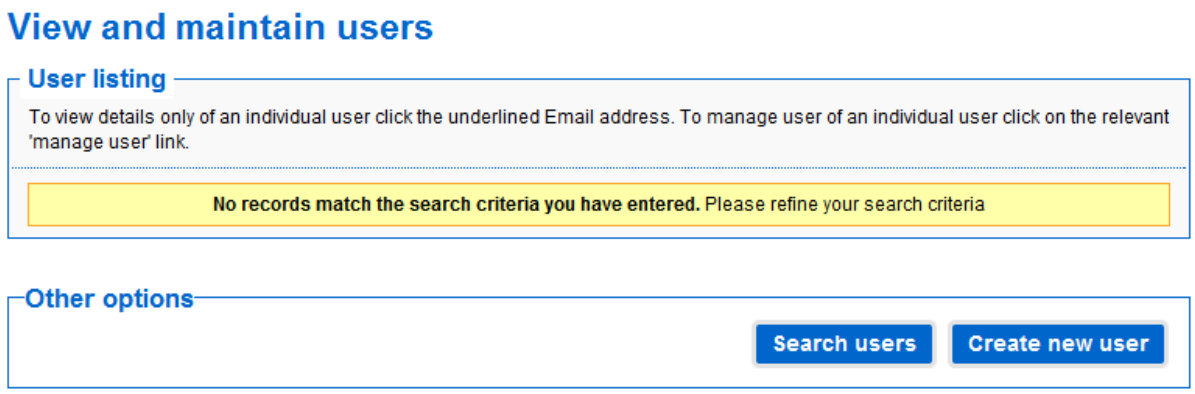

View and maintain users
User listing
To view details only of an individual user click the underlined Email address. To manage user of an individual user click on the relevant 'manage user' link.
No records match the search criteria you have entered. Please refine your search criteria
Other options
Search users
Create new user

**Figure 40: manage user's first view**

Let's create our first one by clicking on the *Create new user* button. This will start the user creation process by requesting the following mandatory user details:

- New user email address
    - This is the email address that the Portal will use to communicate with your admin-user. Be sure to use the correct address as they will need to activate their account (refer to section 2 Initial Steps for more information about the activation process) via the email address entered here. The email address should be unique. Duplicate email addresses will not be accepted by the system.

- New user forename
- New user surname
- New user telephone number

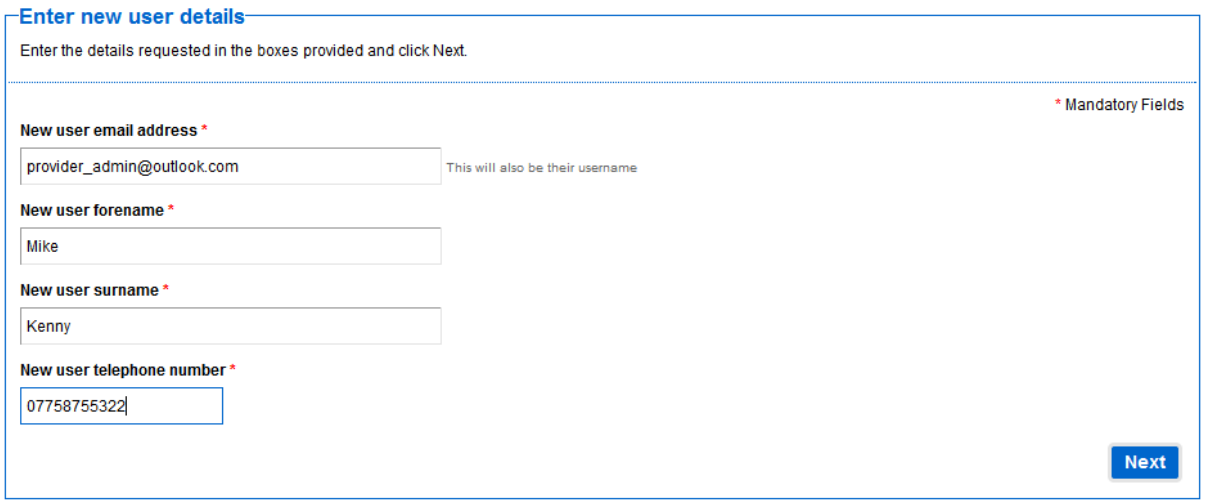



**Figure 41: create admin-user - new details**

Clicking on the *Next* button when done will check the details entered for any errors (e.g. the email address is not valid) and then progress to the next section – Assigning actions and contracts/providers to the user [Figure 42].

Check the appropriate box according to which contract(s) you would like your admin-user to be able to administrate on your behalf, then click the *Next* button to proceed when done.

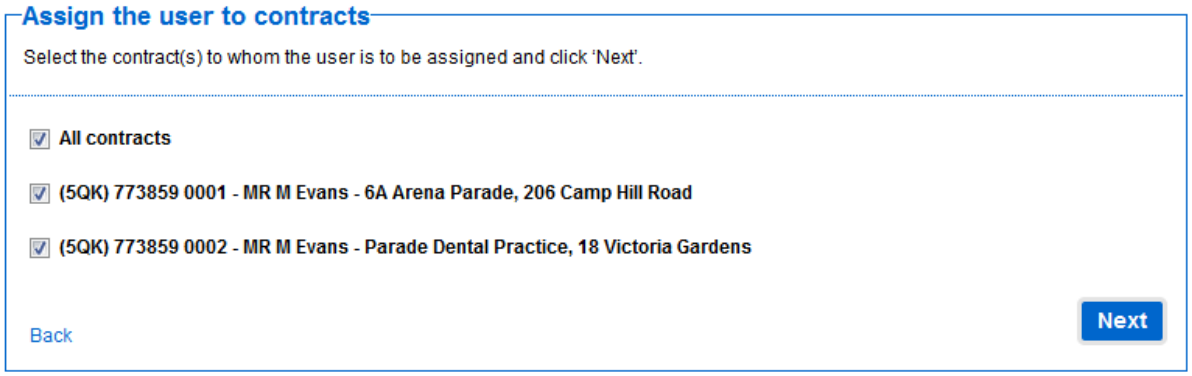

Assign the user to contracts
Select the contract(s) to whom the user is to be assigned and click 'Next'.
All contracts
(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road
(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens
Back
Next

**Figure 42: create admin-user - assign or restrict contracts**

On subsequent visits to the admin-user creation process, you will see the screen below [Figure 43] prior to the Assign contracts view. This provides you with the facility to simply assign contract/provider rights to the new user based on the privileges of a user created previously.

Selecting a user and then clicking on the *Copy user* button will assign the same contract/provider level privileges to the new admin-user as for the selected user.

Clicking on the *Don't copy* button will skip the assignment and take you to the Assign contracts page [Figure 42] for manual selection.

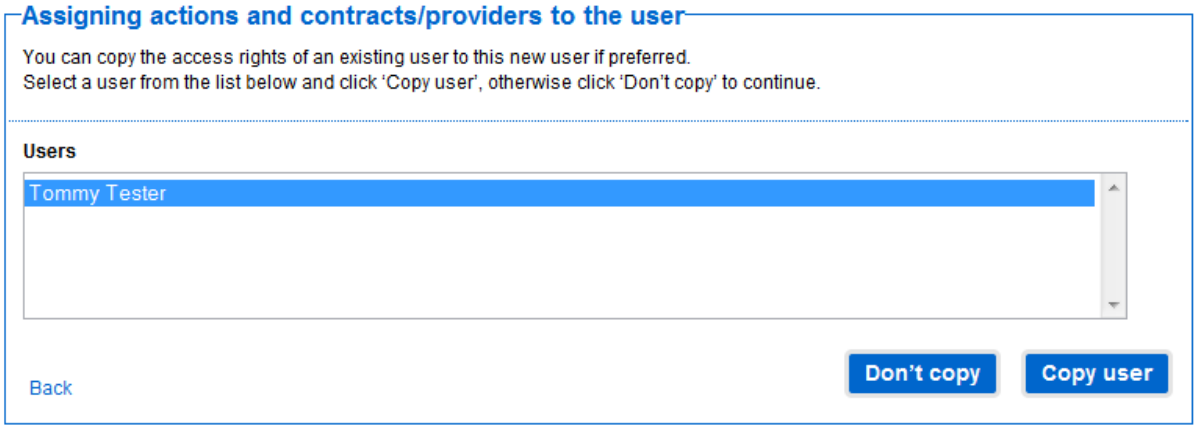

Assigning actions and contracts/providers to the user
You can copy the access rights of an existing user to this new user if preferred.
Select a user from the list below and click 'Copy user', otherwise click 'Don't copy' to continue.
Users
Tommy Tester
Back
Don't copy
Copy user

**Figure 43: *optional* create admin-user step – assign actions based on another user**

Once contracts and/or providers have been assigned, you may proceed to select which actions will be available to your new admin-user [Figure 44]. Check or uncheck the areas of the Portal you wish to give the admin-user access to.

**Note**: The Manage Bank Details area requires access to Contracts also, since access to the Manage Bank Details area is *via* the Contracts pages. You *must* enable both Contracts and Manage Bank Details actions together, or neither.

Once done, click the *Next* button to proceed.

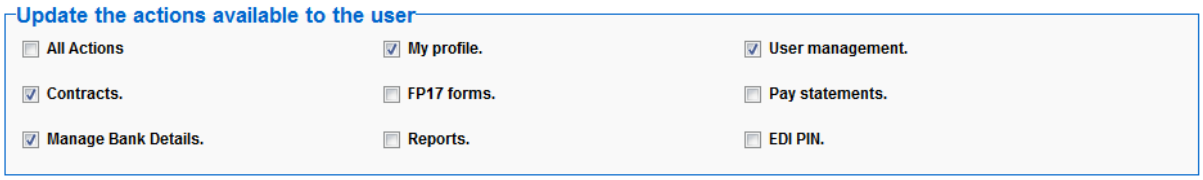



**Figure 44: create admin-user - assign or restrict available actions**

Having given your admin-user some credentials, access to contracts, providers and actions – we're done! A summary of your choices is displayed for you to confirm [Figure 45]. Click on the *Finish* button if you're happy. Otherwise, click *Back* through the admin-user creation pages and modify as required.

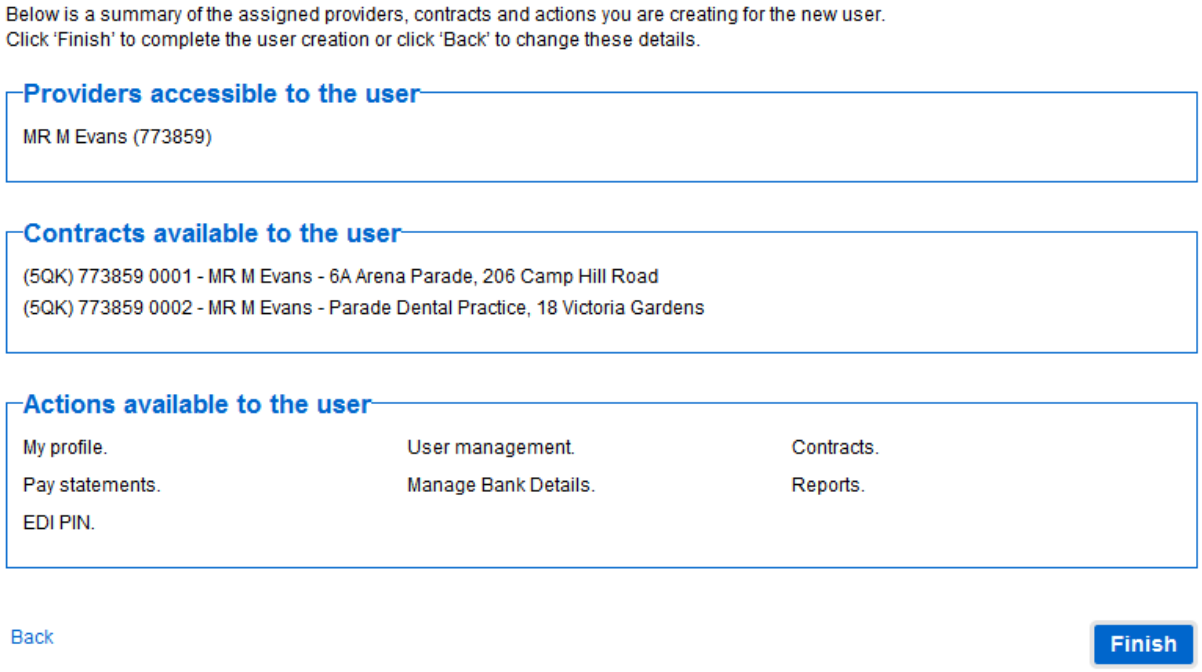

Below is a summary of the assigned providers, contracts and actions you are creating for the new user.
Click 'Finish' to complete the user creation or click 'Back' to change these details.
Providers accessible to the user
MR M Evans (773859)
Contracts available to the user
(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road
(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens
Actions available to the user
My profile.
User management.
Contracts.
Pay statements.
Manage Bank Details.
Reports.
EDI PIN.
Back
Finish

**Figure 45: create admin-user - confirm details**

Once done, a confirmation message is displayed [Figure 46]. An email will be sent to the users email address containing an activation link. Once activated [section 2 Initial Steps refers] your admin-user will be ready to go.

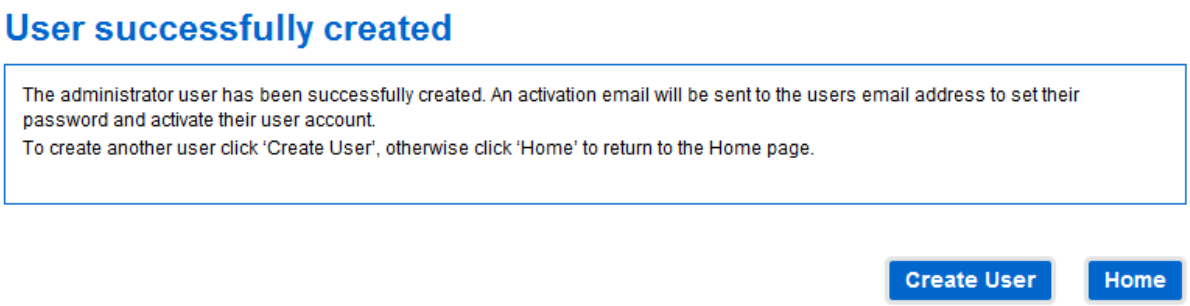

User successfully created
The administrator user has been successfully created. An activation email will be sent to the users email address to set their password and activate their user account.
To create another user click 'Create User', otherwise click 'Home' to return to the Home page.
Create User
Home

**Figure 46: create admin-user - confirm creation**

An overview of the permissions available to admin-users is included below for reference.

- Update the Provider(s) associated with the user
    - Where more than one provider is available, admin-users can be restricted to one or more providers as required using the *All providers* or individual provider checkboxes.
- Update the contracts accessible to the user
    - Where more than one contract is available, admin-users can be restricted to one or more contracts as required using the *All contracts* or individual contract checkboxes.
- Update the actions available to the user
    - The user may be restricted to areas of the portal by selecting or deselecting actions as required, or by checking the *All Actions* checkbox. Actions correspond to chapters of this document as follows:
        - Contracts – section 7
        - FP17 forms – section 7
        - Reports – section 11
        - My Profile – section 6
        - Pay statements – section 9
        - EDI PIN – section 12
        - User management – section 13
        - Manage Bank Details - section 7.6

## 13.2 Manage Administrator Users

Once some admin-users have been created, we need to manage them. This can be done via the user management screens. Clicking on the User management link opens up the View and maintain users summary page with a list of all our admin-users [Figure 47].

We can see there are two admin-users listed below. One with an active account (i.e. they have received their activation link and used it to activate and login to their user account) and one non-active user [*Account status* column]. We can examine these users more closely by clicking on the *Manage user* link and thereby opening the User details view [Figure 48].

Clicking on the admin-user email address instead of the Manage user link will open up the User details view in non-editable mode. Clicking on the *Edit* button at the bottom of the page will enable you to make changes where required.

**Note:** The user details view will open by *default* if you have only one user (there is no *list* to display). Clicking on the *Edit* button enables changes to be made.

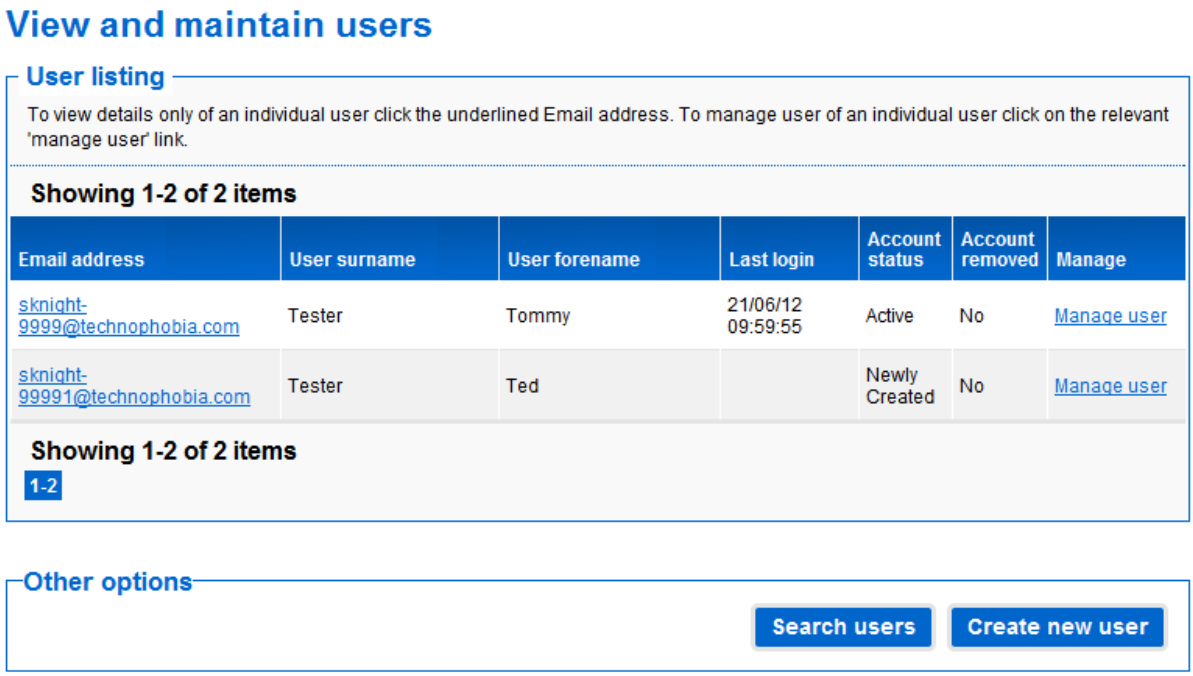



**Figure 47: manage admin-users view**

Once in the edit user details view [Figure 48], we can make various changes:

- User details
- Account locked
    - Check this box to force the admin-user to change their security credentials (password or memorable word) the next time they login.
    - Or, if the user has forgotten their password checking this box will enable them to reset their details (section 4 – Forgotten Credentials refers).
- Account access removed
    - Check this box to remove the user-admin from the system. Please note that **this action is irreversible**. The user will not be able to login again using the same email – ever!
- Copy existing user profile
    - Copy provider or contract privileges from a previous admin-user.
- Update the Provider(s) associated with the user
    - Add or remove provider privileges by checking the relevant boxes.
- Update the contracts accessible to the user
    - Add or remove contract privileges by checking the relevant boxes.
- Update the actions available to the user
    - Add or remove action privileges by checking the relevant boxes.

When done, click Save to confirm the changes or Cancel to revert.

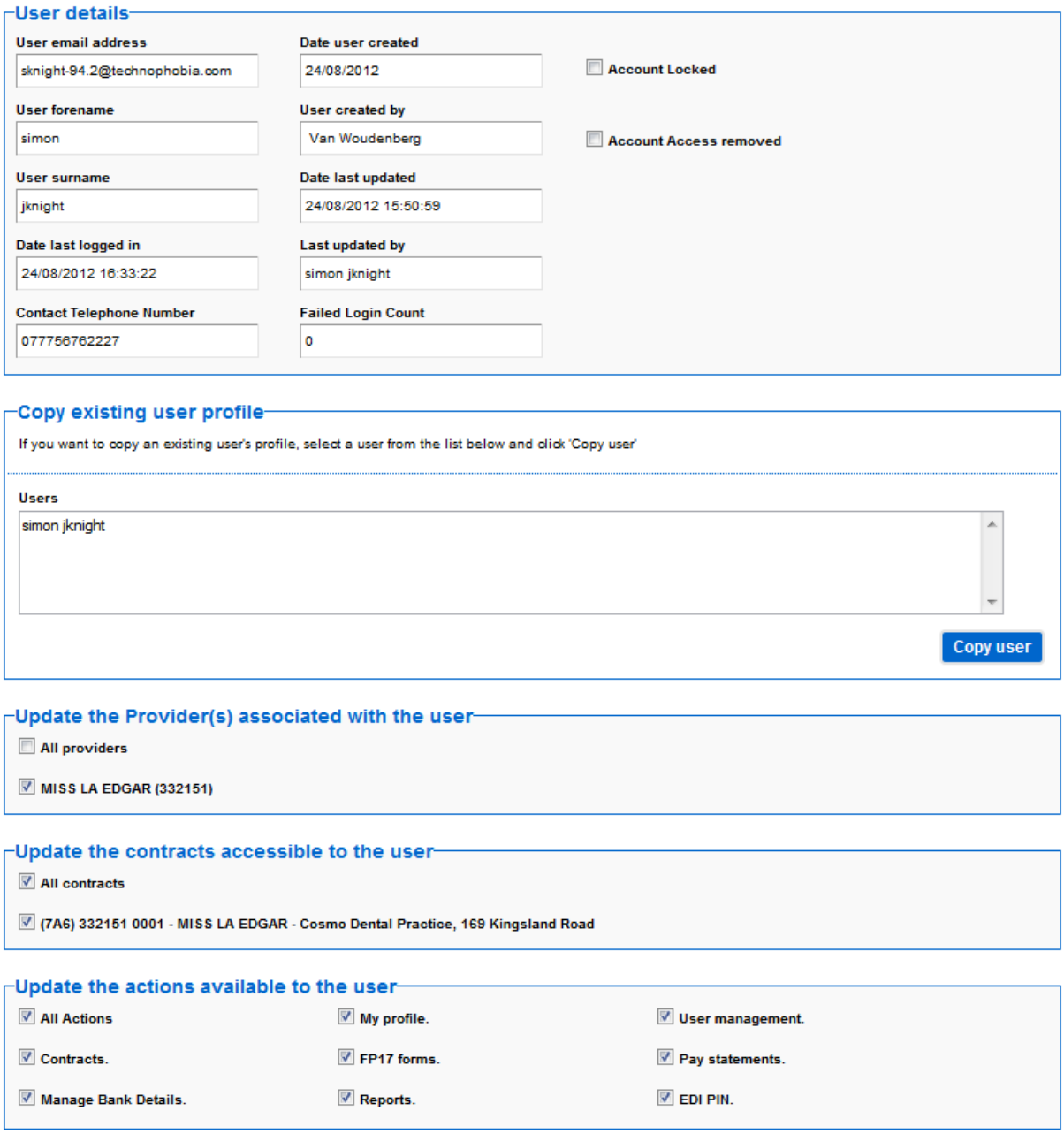



**Figure** 48**: edit admin-user details view**

## 14 APPENDIX – CONTRACT ACTIVITY AND FP17 REPORTS FLOWCHART

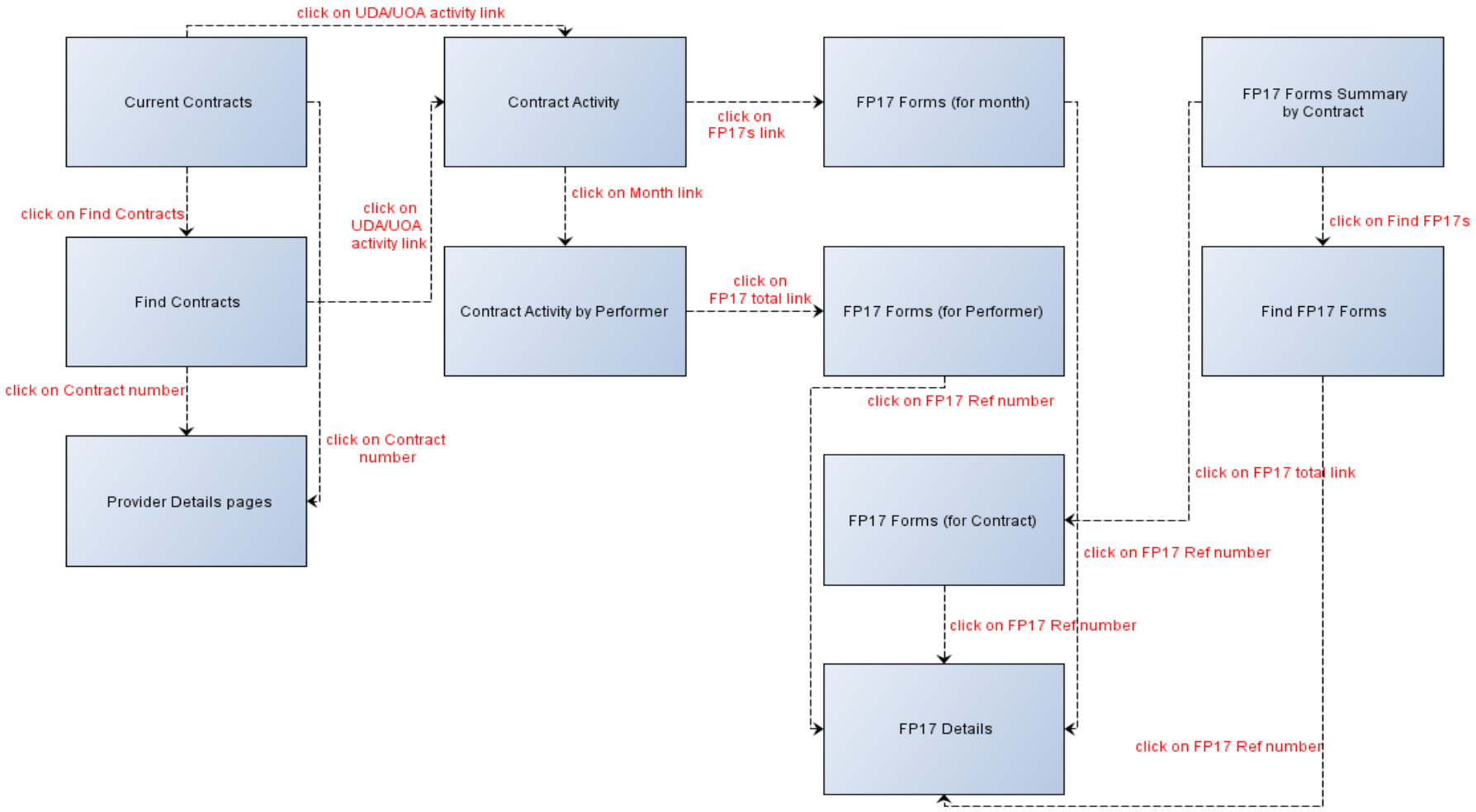

click on UDA/UOA activity link
Current Contracts
Contract Activity
FP17 Forms (for month)
FP17 Forms Summary by Contract
click on FP17s link
click on Month link
click on Find Contracts
click on UDA/UOA activity link
click on Find FP17s
Find Contracts
Contract Activity by Performer
click on FP17 total link
FP17 Forms (for Performer)
Find FP17 Forms
click on FP17 Ref number
click on Contract number
click on Contract number
Provider Details pages
FP17 Forms (for Contract)
click on FP17 total link
click on FP17 Ref number
click on FP17 Ref number
FP17 Details
click on FP17 Ref number

**Figure 48: Contract Activity and FP17 Flowchart**